

von Briesen & Roper Upgrades to Next-Generation DM Efficiency and Ease of Use with Interwoven's Matter-Centric Collaboration Solution

von Briesen

von Briesen & Roper, s.c. | Attorneys at Law

contemporary counsel®

A law firm providing comprehensive legal counsel to banks, businesses, individuals, health care institutions, and units of government.

Industry

Legal

Geography

Worldwide

Implementation Highlights

- von Briesen & Roper uses WorkSite 8 to create matter-centric workspaces for each new client matter quickly and easily, tailored to the specific needs of each of its practice groups
- Secure extranets provide key clients with real-time access to complete matter content
- Automated MyMatter subscriptions help secretaries keep attorneys up-to-date on the latest developments in the matters they work on

Benefits

- Everyone with the firm, including attorneys with advanced and novice technology understanding, can easily find the content they need by using MyMatters and saved searches, without having to call on IT for assistance
- The simple, intuitive matter-centric model has greatly reduced user training requirements, enabling new hires to come up to speed quickly on matters, secretaries to substitute easily for their peers, and attorneys to temporarily support other cases as needed
- Automated metadata assignment has ensured more consistent and uniform profile information, helping users more easily find and use firm-wide content



“Interwoven’s matter-centric collaboration solution helps all of our users find and use content more quickly and effectively, from within their familiar desktop applications. It meets the needs of both advanced and basic users, and gives us the capability to move ahead with a broad range of initiatives like client extranets and knowledge management.”

—Vicky L. Bisbach, director of IT, von Briesen & Roper

Based in Milwaukee with five offices throughout Wisconsin, von Briesen & Roper, s.c. is a century-old law firm representing local, regional and global clients, with a next-generation vision for legal technology. Since its founding in 1904, von Briesen & Roper has focused on finding innovative, cost-effective and practical approaches for delivering exceptional service to its clients. Recently, the firm became the latest organization to adopt matter-centric collaboration—a new paradigm for legal industry document management, pioneered by Interwoven—that combines state-of-the-art technology with organizational principles and practices even older than von Briesen & Roper itself.

While von Briesen & Roper’s move to matter-centric collaboration was made possible by the implementation of Interwoven WorkSite 8, this was not their first experience with Interwoven DM. The firm had been using WorkSite since its initial DM implementation in 1999. “We had looked at numerous options at that point, but WorkSite was the best fit for our needs, and also came from a strong company that we felt could take us into the future,” recalls Vicky L. Bisbach, von Briesen & Roper’s director of IT.

The decision proved prescient. In late 2004, the firm decided that the time had come to take the firm’s DM system to the next level. “We wanted to go more electronic, and also needed a system that could make filing more intuitive for our users,” Bisbach says. Embodied in the latest version of WorkSite, matter-centric collaboration offered an ideal solution on both counts.

Going “Paperless” with Matter-Centric Collaboration

Matter-centric collaboration has rapidly gained broad acceptance in the legal field by enabling

attorneys for the first time to manage matter-related content in the electronic world the way they have done for more than 100 years in the physical world. Matter-centric collaboration creates the true electronic equivalent of a case file by consolidating documents, e-mails, billing, contacts and all other relevant content for any given matter in a single integrated file that is accessible both internally and externally across departments and locations. Overall, WorkSite provides highly intuitive methods for searching, retrieving, transferring, accessing and securing all documents and correspondence.

To prepare for the transition to matter-centric collaboration, Bisbach’s group first met with each of the firm’s four practice groups—Health, Litigation and Risk Management, Business and Banking, Bankruptcy, and Business Restructuring—to learn more about how they currently structured their physical files. “We wanted the workspaces for each practice group to mirror the way they are used to working,” she explains. “Each group uses different folder structures based on their established practices. With WorkSite, we could match that perfectly to a new all-electronic version.”

Based on this exercise, workspace templates were created for each substantive area within the practice groups. Now, each time a client matter is opened, a dedicated workspace can be created quickly and easily. Attorneys know exactly where each e-mail, document or other content item should be stored, and also know exactly how their peers are organizing their own content. Metadata describing each item is assigned automatically based on the folder where it is placed, enabling highly accurate searches without requiring attorneys to fill out lengthy manual profile forms.

While WorkSite had formerly been used extensively by von Briesen & Roper's legal staff, the new version was quickly embraced by other parts of the organization. For example, Bisbach's own IT staff uses WorkSite, as does the accounting department to track invoices and other financial records. "They love not having to keep track of physical files," she reports.

Still, while matter-centric collaboration will dramatically reduce the volume of physical files stored by the firm, and many items will only be stored electronically, von Briesen has been careful not to say "paperless." "A lot of people get scared when they hear that word, so we call it 'electronic document management' instead," she says.

Advanced Functionality Made Simple

von Briesen & Roper completed its upgrade to WorkSite 8 and matter-centric collaboration in early 2005, alongside concurrent upgrades of Microsoft Windows, Office and Carpe Diem time and billing software.

"I believe we are on the cutting-edge of law firm technology in the Milwaukee area," said Randall D. Crocker, president and CEO of von Briesen & Roper. "We strive to provide unparalleled service to our clients and to be among the best in the areas we practice. By embracing new technology, we can reach our goals more efficiently and productively."

Interwoven's partner, Project Leadership Associates (PLA), helped develop, implement and train the firm on the system upgrades. "This was a major technology upgrade for our firm, and PLA saw to it that we experienced a smooth transition," comments Bisbach. "Core to our system was Interwoven WorkSite, but it was just as important that our complete technology upgrade was up and running, and easy to use. This was accomplished 100 percent."

From the beginning, the benefits of the system's more intuitive structure were clear. "It has become much easier to train people on the system, and to help them understand document management in general," says Bisbach, who points to the elimination of manual profile forms as a key advantage of the system. "Saving documents with matter-centric collaboration is so similar to saving regular documents, they pick it up right away—you just drag documents and e-mails into folders, just like with Windows."

WorkSite's integrated e-mail management functionality has been welcomed eagerly by von Briesen & Roper's users. In the past, the firm's e-mails were stored as text files. Now, with

integrated e-mail management and an integrated Outlook interface, e-mails stored alongside other types of content retain their full functionality, and can be forwarded and replied to at any time.

More uniform filing practices and more accurate metadata have made it simpler for attorneys to find what they're looking for, new hires to come up to speed quickly on matters, as well as enabling secretaries to fill in for each other. And for the IT department, calls saying "I can't find my document" have dropped dramatically. Even the most technology-averse attorneys can use saved searches and a MyMatters menu to stay on top of the latest client and matter developments. "We have an attorney who's particularly resistant to change," recounts Sarah Balthazor, trainer, von Briesen & Roper. "He sat in on a training session recently, and at one point he raised his hand to talk about what a great system it was—and explained exactly how it worked. Turning him into an advocate was a big step for us."

Growing for the Future

Having completed the transition to matter-centric collaboration, von Briesen & Roper isn't finished yet. The firm already uses WorkSite to provide secure extranet access to clients, and plans to expand this program moving forward.

von Briesen & Roper is currently working on the creation of electronic knowledge bases, a central place for users to go for information on particular topics. For Bisbach's IT group, workspaces dedicated to Word, Outlook, Carpe Diem and other applications provide problem-solving resources and training topics. Practice groups are creating similar workspaces to make the results of research projects more widely available.

With Interwoven's help, von Briesen & Roper is entering its second century with a DM platform designed for a new era in legal technology. "Because we have a firmly-structured technology platform to build upon, we are ready for any new technology that comes down the pike," said Crocker.

Technology

Solution Summary:

Interwoven's Matter-Centric Collaboration solution for law firms is based on a unique user-centric design which, for the first time, enables professional services practitioners to manage client and matter-related content in the electronic world the way they have done for more than 100 years in the physical world. Legal professionals can consolidate documents, records, e-mails, billing, contacts, and all other relevant content for any given client or matter in a single integrated file that is accessible both internally and externally across departments and locations.

Partner



Headquartered in Chicago, Project Leadership Associates is a leading provider of information technology consulting and solutions to mid-sized businesses. Specializing in network integration, information security, management consulting, electronic data discovery, computer forensics, software development, business intelligence and small business services, PLA helps clients plan, develop, manage and implement cost effective information technology strategies and solutions. www.projectleadership.net.

Interwoven, Inc.
803 11th Avenue
Sunnyvale, CA 94089 USA
(408) 774-2000

Interwoven, TeamSite, Content Networks, OpenDeploy, MetaTagger, DataDeploy, DeskSite, iManage, FileSite, MediaBin, MetaCode, MetaFinder, MetaSource, OpenTransform, Primera, TeamPortal, TeamXML, TeamXpress, VisualAnnotate, WorkKnowledge, WorkSite, WorkDocs, WorkPortal, WorkRoute, WorkTeam, the respective taglines, logos and service marks are trademarks of Interwoven, Inc., which may be registered in certain jurisdictions. All other trademarks are owned by their respective owners. Copyright 1996-2006 Interwoven, Inc. All rights reserved. csvb_1—January 2006.