

Winthrop & Weinstine Stops E-mail Overload with Interwoven



Full-service law firm with extensive background in corporate law and commercial litigation

Industry

Legal Services

Geography

USA

Challenges

- WorkSite 8's integrated e-mail management lets attorneys and secretaries file e-mails in matter-centric folders directly from Outlook—helping the firm enforce strict limits on mailbox sizes
- Attorneys can easily search both their own stored e-mails and those of other firm members, supporting best practices and efficient re-use of work product
- A unified matter-centric repository for e-mails and other content items provides a solid foundation for disaster recovery and records management

Benefits

- Interwoven has helped Winthrop & Weinstine pull its Exchange server back from the brink of a potential failure by reducing the volume of stored e-mails, projected to reach 110G, to less than 50G
- Winthrop & Weinstine has improved client service and reduced the risk of legal malpractice by ensuring that its attorneys always have reliable access to the most recent versions of matter documents
- More efficient e-mail filing practices are helping the firm control costs by maintaining an appropriate



“WorkSite 8 is so flexible, it’s like we’re customizing e-mail management for each individual attorney, based on how they want to handle it. This is a major part of what makes them more efficient.”

—Craig Wilson, IS Manager

Based in the Twin Cities, Winthrop & Weinstine, P.A., is a full-service law firm specializing in corporate law and commercial litigation whose more than 80 attorneys serve clients ranging from individuals and emerging-growth companies to Fortune 500 corporations. As a modern and entrepreneurial firm, Winthrop & Weinstine relies heavily on electronic communications with its nationwide client base. While client-specific extranets serve as the definitive reference point for final versions of matter documents, work-in-progress takes place largely via e-mail—making the reliability and efficiency of its e-mail system a matter of key importance for the firm.

Like many firms, Winthrop & Weinstine recently found itself fighting a losing battle against e-mail overload. With no e-mail management system in place, attorneys and secretaries simply left e-mails on the firm’s Exchange server, creating silos of vital matter content that could not be searched efficiently or shared across the firm. Recalls IS manager Craig Wilson, “They all had their own quirky methods of searching their own e-mails, or just made their secretaries search for it with no idea where it might be, or whether it might have been deleted. It was a huge waste of time and resources.”

As a result, although final versions of documents were readily available, specific versions of work-in-progress could be harder to track down. “A senior attorney might not be able to find the version a client is referring to; inevitably, it would turn up later in an associate’s e-mail folder,” says Wilson. Beyond making a bad impression on the client, the potential for confusion left the firm at risk of legal malpractice.

The productivity impact of Winthrop & Weinstine’s e-mail overload was mirrored by a growing toll on the firm’s Exchange server, which was struggling to keep up with the unchecked growth of its e-mail store—including more than 8,000 e-mails in one attorney’s inbox alone. By early 2003, with the server at 65 gigabytes and still growing by 3 gigabytes

per month, Wilson was already looking for a solution to reduce this burden when the Exchange database reached the breaking point and became corrupted. Although Wilson managed to save the firm’s e-mails through three days of intense effort, the search for a more viable e-mail strategy—as well as a more reliable disaster recovery plan—took on new urgency.

Managing the Chaos

Winthrop & Weinstine didn’t have to look far for the ideal e-mail management solution. An Interwoven customer for five years, the firm already used WorkSite for document management as well as client-specific extranets, which had proven to be a highly effective competitive differentiator. By upgrading to WorkSite 8, the firm could take advantage of fully integrated e-mail management to ease the load on its Exchange server while enabling its professional staff to bring e-mails into the same environment used to manage other types of content.

As the first solution to integrate document management and e-mail management within a single matter-centric environment, WorkSite 8 provides attorneys and secretaries with comprehensive functionality to overcome e-mail overload. Users simply drag e-mail messages from their Outlook inbox into the appropriate WorkSite folder; profile information is assigned automatically. Attachments can be filed as part of the original message or as separate files with their own profiles and associated metadata, while intelligent duplicate detection eliminates redundancies and reduces storage requirements. E-mails and attachments can be searched using keyword and full-text search, and can also be included in the same queries performed on other types of documents.

For Winthrop & Weinstine, WorkSite 8 offered immediate relief for the two most pressing needs. Moving stored e-mails into the same WorkSite repository used for other types of documents would ease the strain on the Exchange server and reduce the risk of data loss, as well as greatly simplify disaster recovery planning. For users,

extending WorkSite's robust, user-friendly search capabilities to also encompass e-mails and attachments would ensure that attorneys could always put their hands on the right version of the right document at the right moment.

From Overloaded In-Boxes to Matter-Centric Simplicity

Winthrop & Weinstine began its WorkSite 8 implementation in February 2005 with a behind-the-scenes server upgrade, then launched a project plan for converting end users that included an added inducement to adopt the new e-mail management functionality. "We put a 200 megabyte limit on their mailboxes. When they reached 250 megs, they could no longer send e-mails until they cleaned their in-boxes. That was a real incentive to put their e-mails in WorkSite," Wilson explains.

As Wilson's team trained and converted each of the firm's 26 practice groups in turn, users came to recognize the value of integrated e-mail management, and soon began to develop their own strategies for putting it to use. In the past, attorneys would forward e-mails to their secretaries to print and file; now, if an attorney wants something to be filed, he clicks on one Outlook flag to signal that it should be filed electronically. Some attorneys use a different flag to indicate that a hard copy should also be filed, though this is optional under the firm's new electronic-first filing policy.

"For secretaries to manage e-mails electronically is far more efficient than on paper, including both filing and retrieving e-mails for our attorneys," said Wilson. Strategies like these have helped the firm maintain an appropriate secretary-to-attorney ratio by recapturing hours of time each day that had formerly been wasted on inefficient manual tasks and needle-in-a-haystack searches for lost e-mails.

Increasingly, Winthrop & Weinstine's attorneys have been sparing their secretaries the need for manual filing of any kind by using WorkSite 8's addressable folders to cc e-mails directly into WorkSite. "Some have gone even further and told their clients to reply-all to e-mails, so incoming e-mails are filed automatically as well. That's a big time-saver," says Wilson.

The firm's communications server delivers faxes to users' inboxes as PDF files, and voicemails as audio files; these are also saved into WorkSite under descriptive subject lines that facilitate searching. Now, instead of scrolling through hundreds or thousands of e-mails, users can find what they need quickly and accurately with subject, matter, number or full-text queries; particularly useful searches are

saved for future reference. By making the matter content in its users' e-mails more readily accessible, Winthrop & Weinstine has enabled greater re-use of work product and knowledge sharing throughout the firm—as well as improved quality of service and reduced the risk of legal malpractice.

With e-mails now consistently filed into WorkSite 8, Winthrop & Weinstine has brought relief to its Exchange server. "If we hadn't done anything, we would have been up to a 110 gigabyte mailbox store by now. Today, we're just under 50G," reports Wilson. Although another Exchange-related crisis is much less likely now, the simplified backup and recovery made possible by WorkSite's unified repository ensures that firm will be on a solid disaster recovery footing whatever the future may bring.

Beyond E-mail Management

Now that its immediate goal of taming e-mail overload has been accomplished, Winthrop & Weinstine plans to focus on deepening its use of WorkSite 8's matter-centric functionality. Initially, all the documents pertaining to a given matter have been filed together in that matter's workspace; next, the firm will start identifying the next level of folders for contracts, memoranda and other specific document types, each with their own automated profile information.

As Winthrop & Weinstine continues its migration to an all-electronic matter file, Interwoven will play a growing role in the firm's records management strategy. At present, when a client matter closes, the entire workspace for that matter—including both e-mails and other types of documents—is archived together within WorkSite. Once the firm has completed the development of its records retention policy, Wilson will turn to Interwoven RecordsManager for comprehensive records management capabilities that are seamlessly integrated with its current WorkSite implementation.

Meanwhile, instead of facing a daily battle with e-mail overload, Winthrop & Weinstine's attorneys and secretaries will continue to reap the benefits of comprehensive e-mail management functionality that is seamlessly integrated into both the Outlook interface in which they spend so much time, and the particular work processes that each attorney prefers. Says Wilson, "WorkSite 8 is so flexible, it's like we're customizing e-mail management for each individual attorney, based on how they want to handle it. This is a major part of what makes them more efficient."

Technology

Solution Summary:

Interwoven WorkSite 8 document management software provides integrated document management, e-mail management and collaboration, organized on a matter-centric model, for Winthrop & Weinstine's attorneys.

Interwoven FileSite provides tight desktop integration of WorkSite with the Microsoft Outlook and Office applications used by attorneys and their staff, enabling them to drag-and-drop e-mails and documents directly into matter-centric WorkSite workspaces.

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. cswin_4—May 2006.