

Doing detective work for a legal firm's document management solution

Challenge

Birketts is a UK top 100 law firm with four offices across East Anglia. Their history goes back 150 years and their reputation as a legal heavyweight in the region has helped them to achieve significant growth as Britain has emerged from recession.

Among the results of this growth was the appointment of Chris Simmons as Director of IT in 2010 and he straight away saw that one of his priorities would be to look at document and email management.

At that time, Birketts were using the case management system Visualfiles.

However, that solution had also become the de-facto document management system (DMS) too "A job it was not performing very well" comments Chris.

A new Birketts office in Chelmsford gave Chris the chance to trial a sector-leading solution called WorkSite.

WorkSite (then known as iManage) was implemented and it quickly proved itself as being the solution of choice for the firm.

The decision to roll out the new DMS across Birketts was easy to make — as long as Chris Simmons could solve the problem of how to move all the documents stored in Visualfiles across to the new system. Although sounding simple, the idiosyncrasies of Visualfiles meant the project needed very specific expertise.

Chris Simmons spoke to six potential suppliers and quickly identified Tiger Eye for the task. Chris says that Dave Wilson and the Tiger Eye team gave him the right combination of skills to help unravel this complex issue.

"Dave Wilson explained how he'd solved a similar problem for another law firm. So here's someone who's gone through the pain barrier!" The pay back for Birketts has been a business solution in which lawyers and other professional workers, instead of having to wrestle with IT systems, can just get on and do their work.

Was it worth it?

This was a major change for Birketts.

What difference has it made?

- Over 5 million documents were retrieved and transferred to the new document management system, WorkSite
- Staff can now do their jobs without being slowed down by the system
- Clients get a quicker, more consistent and responsive service
- Birketts now have a firm-wide platform on which to build upon for the future

Background: Birketts LLP

Birketts is a UK top 100 law firm with four offices across East Anglia. Their history goes back 150 years and the firm has a reputation as a legal heavyweight in the region. Their services focus on corporate and commercial law, property law, commercial and personal litigation, and private client work.



The iManage Document Management System

Having a reliable email and document management system is vital for a business like Birketts.

Now, with a new iManage system in place, Birketts staff can "do their job without being slowed down" by IT, with documents produced quicker and more consistently for clients.



To find out more about how Tiger Eye could help your business, contact Tiger Eye:

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Or visit the Tiger Eye website:
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Solution

Together, Birketts and Tiger Eye devised a data-mining strategy to move all business correspondence, documents and other files from the Visualfiles system to the WorkSite solution.

As Chris Simmons explains: "What we were doing was taking a complex system, Visualfiles, and de-fragmenting the content in it to place it in a solution where people could find things quickly and easily"

He continues: "We are talking about migrating and mining over ten years of data, which equated to over 5 million documents — we are not talking small numbers".

The execution involved finding all the data relating to one client, putting it in the new DMS and presenting it back to the users who would check for gaps in the information. Then the data could be searched again and gaps filled. This process was repeated until all the information was tracked down and the team could start on the next client. Chris says "We never got to a portion of data where Tiger Eye couldn't identify where the information was or where it should go in the new solution".

A project like this demanded flexibility and persistence and Chris Simmons acknowledges that Tiger Eye supplied both: "There are always the unknown unknowns and the ability to change tack on-the-fly is critical".

Outcomes

Chris points out that although it is difficult to put a ROI on a DMS project, there are clear benefits for Birketts.

Users no longer have to wrestle with IT. Chris says "They can do their job without being slowed down by the system. Most of the time they have no realisation they are in and working with the DMS. It's just become transparent". Additionally, clients' documents are now produced quicker and with more consistency.

The DMS has made significant change to the calls coming into the IT help-desk: "Visualfiles generated 50% of all calls. We watched that figure drop dramatically".

Moving to a DMS has also given Birketts the opportunity to build new ways of using the knowledge held throughout the firm. Chris explains: "It's been a catalyst for change. We've started building a knowledge repository in each department and WorkSite is also the home for that content. We couldn't have thought about delivering that (Knowledge Management) initiative under our old system."

"Working with Tiger Eye was very collaborative. We'll be doing some upgrades in future and we will involve Tiger Eye in that. It's an ongoing relationship."

Chris Simmons
Project Sponsor
Birketts

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