

Case Study





Zuckerman Spaeder Re-engineers Records Management to Achieve Superior Information Management

While Zuckerman Spaeder has always been clear about the value of business information, its records management procedures focused on the latter part of the information lifecycle. Users kept documents in attorney folders while records staff took a matter-centric approach. File naming standards varied by office, and often by attorney, which created inconsistencies across the firm. Shawn Mitkowski, CIO for Zuckerman Spaeder recalls, "Our approach to records management was essentially a closed-case processing index that allowed us to get boxes offsite in an orderly manner." To reevaluate their information management strategy, Mitkowski called in systems integrator Younts Consulting from Pasadena, Maryland. The Younts and Zuckerman teams worked together to assess current processes and develop a plan. In the final analysis, user requirements and procedural gaps created an opportunity to give the organization more power over its information.

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Shawn Mitkowski, CIO, Zuckerman Spaeder

Accomplishing Positive Change Firm-Wide

Mitkowski describes some key objectives of the implementation. "We wanted to be sure the benefits of the solution would extend firm-wide, and not just improve processes for one office or department." This meant the new changes would enhance processes at six offices, across 60 practice areas, and for 300 employees.

In addition to a smooth, quick firm-wide roll-out, Mitkowski wanted a unified interface to access and manage records within their electronic matter files, already in Interwoven WorkSite, and their physical ones. In the past, the firm had to use two other records management products to try to solve their challenge, the most recent of which was Accutrac, but neither delivered seamless integration with Interwoven WorkSite. Since the new plan involved users working from within Microsoft Outlook with WorkSite, full integration with WorkSite was critical. This made Interwoven Records Manager the right choice.

To transform physical record-keeping and remedy the practice of secretaries and attorneys randomly creating physical record names, the Interwoven Records Manager standards and templates feature provided for firm-wide file naming standards. Now, rich metadata can automatically be applied to all documents enabling label creation without records department intervention. This process saves time and increases efficiency while ensuring staff create conforming records.

Unifying the Records Management Environment

To make document retrieval more efficient, Zuckerman Spaeder users now access their electronic matter file and records management systems through a unified interface. "This makes the integration with Interwoven WorkSite so

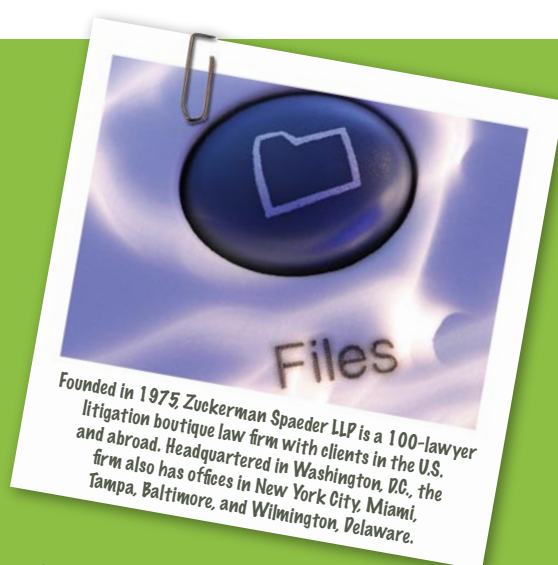
Industry Legal

Challenges

- Integrate electronic matter file and records management capabilities within a unified environment
- Manage all document types—electronic, physical, and e-mail—within a single system
- Foster collaboration through easy search and retrieval of firm-wide content
- Organize the firm's 1.25 million matter documents for faster, simpler access
- Standardize file naming for physical records across the entire firm

Benefits of Using Interwoven

- Seamlessly merges Interwoven WorkSite and Interwoven Records Management systems
- Supports firm's transition to a firm-wide matter-centric approach
- Organizes firm's active electronic matter folders to enable staff to find all document types faster and more efficiently
- Brings together all content types under a single, unified, records management environment
- Enables legal staff to create conforming records without assistance from record staff for added efficiency



Solution

Interwoven WorkSite provides the foundation for the electronic matter file and matter file content management for the firm enabling geographically dispersed teams to create content, collaborate and coordinate business-critical activities. For Zuckerman Spaeder, WorkSite is providing integrated document, records, and e-mail management capabilities within a unified environment making it easy for the legal professionals to manage, store, and collaborate efficiently between their six locations; integration with the firm's time and billing and docketing systems provides up-to-date information on matter file status from a single point of access. With Interwoven Records Manager, the firm can now manage this content under a unified records policy without impacting the organizations already existing work practices.

successful. Our ability to integrate electronic and physical records and give users the tools to search and retrieve across both systems is the main reason we chose Interwoven," says Mitkowski. The new system moves the firm to a centralized, matter-centric approach across the board. Attorneys, secretaries, and records staff can manage records using a singular repository for work-in-progress, final documents, e-mails, voicemails, and other media types. Interwoven's integrated e-mail management functionality enables staff to drag e-mail messages directly from their in-boxes to a client-matter WorkSite folder. And Interwoven's open architecture makes integration with systems such as docketing easier for more efficient data exchange.

A Smooth Roll-Out to Users

In the midst of myriad changes, the team had to be careful not to disrupt user productivity. Mitkowski says, "We didn't hold document management system training per se—we did functional training walking users through the lifecycle of creating and managing legal documents both from a search and retrieval perspective to a workload perspective and then on to a records perspective." Interwoven Records Manager provides users with fully integrated, end-to-end records management capabilities.

Interwoven enabled Zuckerman Spaeder to recreate their processes from the ground up and address a multitude of issues Mitkowski says, "We brought together separate silos of information. Records are no longer something only the records department addresses. Users have a view into docketing which was previously in its own world in accounting. We have re-engineered how people work on a daily basis for the better," says Mitkowski.

Another key benefit was Interwoven's ability to customize at the user level. Users can make selections while creating file parts to indicate the type of document media they are using, or add in the reference number of the old file plan—activities that were not possible with the previous system.

A New View of Records Management

Zuckerman Spaeder has moved beyond their "closed case processing system" to a fully integrated electronic matter file and records management system that supports users from document creation and categorization to retrieval and retention. "Users have the tools in place to manage their information throughout the lifecycle, which is very powerful."

"Zuckerman Spaeder's decision to implement Interwoven gives them the capabilities they need to manage the flood of electronic records," says Mike Younts. "Because RM is so much more process-oriented than ever before, professional law firms are looking for a system that can unify and simplify these tasks. The Interwoven solution makes it possible to accomplish this," says Younts.

About Interwoven

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments. Our unique approach combines user-friendly simplicity with robust IT performance and scalability to unlock the value of content. Some of the most recognized enterprise and professional services organizations worldwide have chosen Interwoven, including: adidas, Airbus, Avaya, Cisco, DLA Piper, the Federal Reserve Bank, FedEx, HSBC, LexisNexis, Microsoft, Samsung, Shell, Samsonite, White & Case, and Yamaha. Over 20,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit www.interwoven.com.

Interwoven, Inc.
160 East Tasman Drive
San Jose, CA 95134 USA
(408) 774-2000