



Lexis® Document Profiling Smooths Law Firm's DMS Conversion, Helps Minimize Downtime and Reduces Number of Hard-to-Find Documents by Two Thirds

Overview

Location:

Offices in Cincinnati, Cleveland, Columbus and Dayton, Ohio; Covington, KY; Indianapolis, IN; Phoenix, AZ; and Beijing, China

Industry:

Legal services focus on local and international needs of individuals and corporations.

Customer Profile:

Founded in 1885, Taft has 350 attorneys who concentrate in the areas of bankruptcy, business recovery, business restructuring and creditor rights, corporate law, environmental law, immigration, intellectual property, international law, labor and employment, litigation, personal and estate planning, public law, real estate, taxation and workers' compensation.

Business Situation:

To support its growth strategies, the firm was preparing to migrate from its document management system to a more scalable solution with Interwoven® Worksite. Taft was also integrating documents and data related to multiple firm acquisitions.

Solution:

Taft used Lexis® Document Profiling.

Benefits:

- Smooth conversion, optimizing client service and cost-savings
- Minimal downtime
- Improved organization and document findability

Product Summary

Lexis Document Profiling maximizes the value of a firm's internal document collection by improving the organization, consistency and accuracy of document profiles.

At Taft Stettinius & Hollister LLP, technology leaders were managing much more than the usual amount of change. Within a few months, Taft would be merging with two other law firms. To support Taft's overall growth strategy, the firm was planning to migrate from its document management system (DMS) to Interwoven® Worksite for more scalability.

"Our job was to make sure we could create a technical environment which would allow us to scale very easily," said Steven J. Smith, director, information systems. "That's the predominant reason for our upgrade to Interwoven. We needed to be able to share work product across any geographical boundaries. A lot of our time is spent mitigating traditional boundaries so we can serve clients."

An enterprise approach would also help the firm make the best use of internal resources. "For us to remain profitable and be competitive, we need to manage associate, partner and timekeeper resources better than anyone else," said Smith. "We have to have the ability to make sure our professional capacity gets utilized and client matters can be answered in an appropriate way."

The Situation

For Taft, business takes place around the clock—and around the world—so downtime during the migrations had to be minimal. Smith and his team committed to migrating each office over a weekend with all data intact and accessible on Interwoven by early Monday morning.

The combined migrations related to mergers and the DMS transition would involve 2.5 million documents, including many with multiple versions. While managing the migrations, the firm's technology leaders had to provide ongoing system stability for the existing operation of 700 users—and ensure document integrity. "Ultimately, we had to ensure confidentiality of our documents whether related to firm business or client business," said Smith. "We had to maintain total document integrity."

Added Brian R. Clayton, technical operations manager, "In moving from our existing DMS to Interwoven, we needed to find the best way to keep document integrity—the metadata and the profiling information that attorneys and staff members had spent years putting into the document management system."

Clayton had experience with Lexis Document Profiling in a similar migration at another firm. With that experience in mind, Clayton said, "We solicited LexisNexis immediately and began the project."

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Director, Information Systems
Taft Stettinius & Hollister LLP

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Technical Operations Manager
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The Solution

To demonstrate how Lexis Document Profiling could help, LexisNexis brought a server to the firm’s Cincinnati office and performed an analysis of the documents and the ethical walls in place to prevent inadvertent access that could pose a conflict of interest. Said Clayton, “Without knowing much in advance about our document population, the Lexis team showed us what they saw, and we could tell they were right on.”

To manage, execute and train for the firm’s Interwoven integration, Taft had engaged Traveling Coaches, an experienced Interwoven Certified Partner. Once Smith and Clayton saw the value LexisNexis could add by extracting the data from their DMS and mapping the export files for clean profiling, they introduced the two technology teams to begin collaboration.

Traveling Coaches helped Taft determine the firm’s new Interwoven document classes based on the needs of practice groups in the firm. Then LexisNexis was able to set up migration paths from the existing DMS doc types to the new document classes. In a minority of cases where there was some doubt about how to best recategorize documents, the authors had a review opportunity.

For more on the interaction between LexisNexis and Traveling Coaches, see the box on page 4.

Clear Analysis, Timely Action

LexisNexis provided the firm’s DMS document counts in total and by various profile fields (author, client, type, etc.), as well as performance metrics on time needed to export the profiles.

The firm’s existing DMS and Interwoven data sets didn’t have a clear, logical migration path from SQL to Oracle®, said Clayton, but he added, “The Lexis team was able to give us some pre-migration insight on what data was residing in each office, what needed to be migrated and what complications could be foreseen. They did a lot of the heavy lifting to help position the document information so that it *could* be migrated, and then went back at the end and helped us look back and see what we needed to clean up. So we felt comfortable moving from each office to the next based on that data.”

Smith added, “The ability to segregate documents in very logical data sets basically helped us plan how we were going to migrate. Knowing the volume of documents by practice area, by author, by document class, helped us map how and when we were going to do our implementation for various departments and offices. It basically laid the foundation for how we planned our whole implementation.”

Since Taft planned to convert each office over a weekend, the firm had to overcome potential volume restrictions. Said Clayton, “Other tools had restrictions regarding how many documents you could move at once due to the application program interface of our DMS. With our large conversion weekends, we couldn’t move just 2,000 documents at a time. LexisNexis was able to go around the API of our DMS. We were then able to manage the migration, manage risk, and move to a better position and a new document management system. Things that were miscataloged or misprofiled before were corrected in the new system.”

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Profiling Critical to Success

How helpful was Lexis Document Profiling in Taft’s DMS migration? “Profiling was an absolutely critical component of our ability to successfully migrate from our existing DMS to Interwoven,” said Clayton. “No doubt about it.”

Because profiling enabled Taft to proactively identify miscataloged documents before the conversion, Smith added, “the end result was actually better than what we had previously.”

In addition, profiling enabled the firm to migrate and confirm the integrity of its ethical walls and document security. Said Smith, “Those are absolute necessities for us to maintain client confidences. Document profiling enabled us to do that.”

Based on the success of its document migration, Taft also used the Lexis Document Profiling team to perform e-mail analysis and a Corel® WordPerfect® analysis. Clayton noted, “The way we use the product itself continues to change based on the information we discover about our database and the flexibility of the Lexis team.”

Benefits

Smooth Conversion, Positive Results

Said Smith, “I wouldn’t underemphasize the importance of a successful document conversion and the energies we didn’t need to expend to manage and provide oversight because LexisNexis did an outstanding job. ... Having them manage that component and do it exceptionally well allowed us to maintain this environment ... also, migrating the data in such a quick, effective way enabled the firm to optimize client service.”

Document profiling also helped ensure reliability. With analyses and reports both before and after the conversion, Clayton said, “We were able to make sure we moved everything the way we thought we did and we didn’t drop the ball on any document population.” He added, “Completing nearly all of the process correctly the first time provided a cost-savings.”

Minimal Downtime

After the Lexis team made several optimizations to meet Taft project timelines, the actual export took approximately 10 hours per office to complete. As a result of the combined efforts by LexisNexis and Traveling Coaches, Taft attorneys were able to work using the firm’s earlier DMS until 6 p.m. on a Friday night, and Interwoven was available for their use by 8 a.m. Monday morning. Traveling Coaches’ training—usually the week prior to the conversion—facilitated rapid understanding and adoption of the new technology.

In addition, the firm had originally planned to conduct its e-mail migration after the DMS implementation. Attorneys were concerned about the possibility of not having access to past e-mails for several weeks—or even months—after the DMS migration. To prevent that problem, the Lexis team extracted e-mail metadata from the firm’s earlier DMS proprietary structure and provided efficiencies to migrate e-mails during the implementation.

Teaming for a Successful Integration

To manage and execute Taft's migration from its DMS to Interwoven—and train Taft's database administrators and users—the firm engaged Traveling Coaches, a long-standing Interwoven Certified Partner. Traveling Coaches already had strong experience with Taft, as well as half of The Am Law 100® and AmLaw 200®. Then, based on proven LexisNexis success in migrations from that DMS to Interwoven, Taft added Lexis Document Profiling experts to the project team.

Traveling Coaches analyzed the firm's DMS structure and held focus groups with Taft's administration, as well as each practice group, to design a "matter-centric" structure of folders customized for the work handled by each practice group.

"We provided LexisNexis with the classes and types of documents we collected in the focus groups," said Linda Miller, principal, CTO of Traveling Coaches, who led the content management and project management teams for the Taft project. "Then, to profile a particular type of DMS doc type as a specific class in Interwoven, LexisNexis would remap the export files. If there wasn't a match, Lexis Document Profiling would help determine what kind of document it was and make a match to Interwoven. It was definitely a team effort."

Said Todd Sons, director of operations at Traveling Coaches, "The Lexis team did an excellent job and was very quick to help if criteria needed to be changed or data needed to be mined again to provide a high quality migration."

Added Miller, "We wouldn't have been able to do this migration as effectively without LexisNexis and their searching tool ... Lexis Document Profiling made exporting vital data a breeze."

For Taft, data imported into Interwoven was automatically funneled into the correct folder based on client, matter number, and class because of the matter-centric structure combined with Lexis Document Profiling. Now, new documents that are saved in the right folder are automatically profiled properly. The user just has to type a description.

Without this level of service, downtime without access to documents or e-mail could have been on the order of days or a week for attorneys—a loss of billable time that could have amounted to tens of thousands of dollars.

Fewer Hard-to-Find Documents

Lexis Document Profiling reduced the number of miscellaneous or unclassified documents in Taft's system from 600,000 to 200,000. As a result, the 20% of the firm's entire document collection that was once hard to find is now easier to find using meaningful document classes like "Agreement" or "Pleading."

A Promising Relationship

Before the DMS implementation with Lexis Document Profiling, Taft was using the LexisNexis® services for some legal research and document automation through HotDocs® software.

Now, says Smith, the relationship has become stronger. "Post-implementation, there's potential to improve attorney efficiency, and we're much more apt to look to a LexisNexis product to do that." He added, "When people deliver what they promise, you remember."

About LexisNexis

LexisNexis® (www.lexisnexis.com) is a leading global provider of content-enabled workflow solutions designed specifically for professionals in the legal, risk management, corporate, government, law enforcement, accounting and academic markets. LexisNexis originally pioneered online information with its Lexis® and Nexis® services. A member of Reed Elsevier [NYSE: ENL; NYSE: RUK] (www.reedelsevier.com), LexisNexis serves customers in more than 100 countries with 18,000 employees worldwide.

About Lexis Document Profiling

Law professionals use Lexis Document Profiling to easily classify and tag documents—making them optimally findable. The results: less administrative work, more effective searching and more time to focus on the legal needs of clients. Because Lexis Document Profiling provides a standardized document platform, the firm's IT project pipeline can move more quickly and technical staff can save months on critical projects. Firms involved in mergers can cut weeks and even months off their document consolidation process, considerably increasing ROI and profitability.

For More Information

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