

Solution Overview: Managing Knowledge and Projects with Autonomy iManage

Autonomy iManage Worksite powers electronic project files for Verdonck, Klooster & Associates. Integration with the firm's practice management system automates the generation of online project files as engagements are initiated, providing professionals with a single, easily accessible and auditable environment to manage complete engagement content. Offsite functionality and a Web interface make it simple for consultants to work with project content anytime, anywhere. Outlook integration helps the firm capture, manage, and share complete email and attachments alongside other types of information. By searching the WorkSite repository, VKA's professionals can identify the authors of documents relevant to their current needs and more easily leverage their knowledge.

Leveraging Knowledge and Expertise Firm-Wide

VKA uses WorkSite to support a novel form of knowledge management. Rather than seeking specific documents on a topic, consultants use search to identify the peers who have authored them, a reflection of their expertise. "The next step is to give him a call, present the problem you're working on, and he can help you in a few minutes by providing approaches and lessons from past engagements," explains Beukers. In turn, these colleagues can use WorkSite to search their own files and provide the most helpful possible response. During user training, a list of 200 past engagements stored in the system triggered a sense of déjà vu throughout the firm. "The memories of past projects that resurfaced were a big plus in our consultants' acceptance of the system," says Beukers. "It's very simple, but has a huge effect."

Reducing Risk

VKA no longer had to worry about information being lost through hard drive failures, misplaced paper files, or employee departures; all content is now stored and backed up centrally. "WorkSite has helped us achieve better risk management, disaster recovery planning, and business continuity," says Beukers. "When our clients audit our methods, they're quite positive and reassured about the security and confidentiality of their information."

Next Steps

VKA continues to derive additional value from WorkSite. The firm has worked with Morningstar to integrate WorkSite with a newly implemented Interaction CRM system, helping consultants track individuals even as their roles and positions change while maintaining consistent links to the projects managed in WorkSite. The firm is also considering the implementation of Interwoven Universal Search to streamline the identification of document authors with specific expertise. Still in the brainstorming stage: integrations with additional forms of voice and text messaging to enhance collaboration. Having replaced the informal information management methods of the past with state of the art electronic filing, VKA is now setting a new standard for professional services performance and efficiency.

About Morningstar Systems

Morningstar Systems is a specialist in Context Management and Enterprise Content Management. Focused on improving information intensive processes both internally and externally, the company has developed a number of implementation methods and techniques that are the basis of a new expertise called 'Context Management'. As a certified reseller, it offers high standard applications in the fields of document, knowledge, email and records management, as well as related applications such as customer relationship and business process management. In addition to the professional services industry, Morningstar Systems provides solutions to enterprises in the petro chemistry, pharma chemistry and financial services sectors.



Founded in 1996, it is part of the I.R.I.S. Group. With more than 500 ECM professionals and offices in The Netherlands, Belgium, Luxembourg, France, Germany, The United Kingdom, The United States and China, the I.R.I.S. Group is the largest ECM specialist in Europe. For more information: www.morningstarsystems.nl and www.irislink.com

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VKA Improves Quality of Service, Knowledge Sharing, and Risk Management with Autonomy iManage

Overview

As Verdonck, Klooster & Associates grew, the firm found that its ad hoc information management processes could no longer keep pace with the size of its staff or its business. Many electronic documents were stored on consultants' laptops rather than on centrally accessible file servers; paper files were also used, both at the customer location and at headquarters. When one client sought to audit its project-related information, the firm found that the consultant who'd handled the job had recently left VKA and much of his content was no longer accessible. "We clearly needed a more consistent, reliable way to manage information," says Joost Beukers, managing director, VKA. "We also found that it was becoming more difficult for new consultants to discover and apply the lessons of projects not just from the past couple of years, but throughout our entire history."

VKA turned to Morningstar, a leading IT consultancy and integrator, who recommended Interwoven WorkSite document management software. VKA found WorkSite's close integration with Microsoft Office and automated metadata assignment ideally suited for its consultants, providing high ease of use to allow them to focus on projects rather than tools. Offsite functionality make it simple to access complete project information at the client's site, even when Internet access is not available.

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Joost Beukers, Managing Director, VKA

Taking Project Information Online

Working with Morningstar, VKA used WorkSite to create online project files that bring together emails and other types of content within a unified environment that can be searched and shared easily firm-wide. "Morningstar's experience with the system's technology and architecture brought valuable expertise and best practices to our implementation," says Beukers. Morningstar provided tools to automate the migration of VKA's legacy electronic files into WorkSite and integrated the system with the firm's time and billing system, which now generates new workspaces automatically as new projects are acquired. Each of the firm's eight practice groups has its own workspace; private workspaces are also provided to each consultant.

Although VKA initially intended to use WorkSite only for project information, the scope of the deployment soon broadened to departments including human resources and IT. "Once we saw how well the system was working, people started asking if we could use it for internal functions as well," says Beukers.

Enhancing Productivity, Quality, and Accountability with Complete Project Files

"All our project files are now available electronically. A simple, consistent structure for each workspace makes it very clear where to look for things, complemented by the search function," reports Beukers. As a result, the firm's consultants can deliver optimal quality of service. "People are certainly working faster with WorkSite, and are more intimate with the details of their projects. The fact you can present the complete file within minutes, rather than spending days searching, collecting, and bundling all that information, presents a very powerful message to both customers and auditors. Also, by storing complete sales-related documents and correspondence in the project file, we can make sure every consultant knows the original customer questions and doesn't go down the wrong path or exceed the scope of the engagement."

**VERDONCK
KLOOSTER &
ASSOCIATES**

Verdonck, Klooster & Associates

Verdonck, Klooster & Associates are an independent consultancy company with extensive experience at the intersection of strategy, implementation, and ICT in the public sector.

Industry

Management Consulting

Challenges

- Project information and emails scattered across servers, local drives, and paper files couldn't be managed or audited effectively
- Consultants lacked an efficient way to leverage information and peer expertise from past projects
- There was no reliable way to prevent information from being lost through accident or employee attrition

Benefits of Using Autonomy iManage

- WorkSite provides a complete electronic project file, including email and other documents, enhances productivity, auditability, and quality of service
- Consultants can quickly locate and leverage both historical content and paper expertise relevant to their current needs
- The risk of information loss has been greatly reduced



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