

Case Study



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## Gallagher Sharp Puts Best Practices and Expertise to Work with Interwoven-Powered Electronic Matter Files

Gallagher Sharp has long relied on Interwoven WorkSite as a definitive platform for leveraging information assets and maximizing staff productivity. Says Associate Mark Turner, "Interwoven WorkSite keeps us from having to reinvent the wheel all the time. We simply look in the repository to see what kind of work has already been done on a subject; it gives us a headstart on the matter at hand.

After nearly a decade on WorkSite, Gallagher Sharp found that it was time to upgrade its filing practices. As its database grew larger, inconsistencies in manual document profiling were making it more difficult to find items even within a single matter. "You could search by matter number and get 5,000 hits; on the other hand, more precise searches might miss items that had been filed using different terms," recalls Turner. Finding similar cases to re-use their content and expertise required multiple searches.

*"As Interwoven WorkSite's electronic matter file helps us become more effective in leveraging our firm information, that efficiency translates into money saved for our clients, and time we can dedicate to other aspects of the case. It's a real win-win."*

*Mark Turner, Associate, Gallagher Sharp*

"We felt that a structure and metadata provided by an electronic matter file would help our attorneys and paralegals find things more quickly." By updating its WorkSite implementation from a traditional document model to an electronic matter file, the firm could realize the benefits of leading-edge best practices for legal technology while continuing to leverage its existing Interwoven investment.

### Upgrading to an Electronic Matter File

Gallagher Sharp worked with Interwoven partner Smart Solutions, Inc. ([www.smartcollabs.com](http://www.smartcollabs.com)) to roll out electronic matter files across the firm, organizing all matter-related content into a standardized folder structure within dedicated matter workspaces. Smart Solutions also helped the firm create a workflow for assigning new cases to a practice group and generate the appropriate workspace, accelerating the new matter opening process. Workspaces were also created for internal departments such as accounting, marketing, and docket. "We're getting every group and every document onto WorkSite so there's a simple way to organize and locate any type of information the firm deals with," says Bob Madden of Smart Solutions.

### Maximize the Value of Firm Information Assets

"The ability to have an entire case file in front of you instead of having to do multiple searches in multiple systems, and having it all indexed by group, is extremely effective for organizing and staying on top of a file," reports Turner. "Beyond that, WorkSite helps our lawyers leverage their colleagues' existing research and knowledge for current matters, and draw on our firm's best expertise and best practices in everything we do."

Pre-defined folders for each matter ensure correct and consistent filing by attorneys and staff. "In the past, the same type of content might end up in three or four different places," says Turner. "Now, if you're looking for a particular interrogatory or an idea of how to phrase something, you can immediately go directly to the discovery folders in a variety of cases, instead of having to figure out how the documents were labeled and stored." As WorkSite's electronic matter file helps us become more effective in leveraging our firm information, that efficiency translates into money saved for our clients, and time we can dedicate to other aspects of the case. It's a real win-win."

#### Industry

Legal

#### Challenges

- Different filing systems made it increasingly difficult to leverage firm knowledge
- E-mail and externally generated documents were stored separately from related matter content, impairing document retrieval efficiencies.
- Lawyers needed to be able to access complete matter-related e-mail and other content in a unified matter file

#### Benefits of Using Interwoven

- An electronic matter file helps lawyers maximize the value of firm content, expertise, and best practices
- A unified content environment aids efficient file handling and simplifies e-discovery
- An automated new matter opening process streamlines the assignment of cases and the creation of a structured electronic matter file



## Solution Overview/Leveraging Firm Information and Best Practices with Interwoven

Interwoven WorkSite powers the electronic matter file for Gallagher Sharp, enabling the firm to manage complete matter-related documents and e-mails within a unified environment. Seamless integration with Microsoft Office and GroupWise allows attorneys and staff to access the system from within familiar productivity applications and streamline content filing. Automated profiling and standardized workspaces support fast, accurate search and access, and help attorneys re-use past work, expertise, and best practices. A utility created by Interwoven partner Smart Solutions automates the matter opening process and speeds the assignment of cases to attorneys.

### Managing Risk through Unified Content

Automated profiling encourages Gallagher Sharp's professionals to store externally generated content such as discovery, evidence, and documentation within the same electronic matter files as other items, aiding risk management and e-discovery. WorkSite's GroupWise module for e-mail integration makes it simple for users to file and manage e-mails within the same unified DM environment. "Our firm does a lot of legal malpractice defense work, so we're quite familiar with the challenges of e-discovery," says Turner "Having complete documentation readily accessible in WorkSite rather than having to sort through an e-mail system backup can be a tremendous advantage."

### Streamlining Business Processes

In the past, Gallagher Sharp's new matter opening process involved multiple steps: a new matter file would travel in paper form to the docket group, then go to an assigning attorney, then back to docket, then to a practice group manager, then to the individual attorney. Now, new matters are exported in electronic form from the firm's practice management system and imported by WorkSite's Workspace Generator to create a dedicated matter workspace. This allows work to begin immediately on the matter while the practice group manager is completing the administrative steps of new matter setup. "This can save three or four days in assigning an attorney," says Turner. "It gets the matter moving more quickly and allows for rapid response and timely communication with our clients."

### Staying at the Leading Edge

Gallagher Sharp's state-of-the-art electronic matter file and process automation position the firm well to meet the evolving needs of its business. "As our major clients start moving in a more paperless direction, we'll have the flexible, efficient systems in place to accommodate them," says Turner. "While our initiative was driven primarily by the need for internal efficiency and control, our strategic position at the forefront of legal IT is valuable as well."

### About Interwoven

Interwoven, Inc. (NASDAQ: IWOV) is a global leader in content management solutions. Interwoven's software and services enable organizations to maximize online business performance and organize, find, and govern business content. Interwoven solutions unlock the value of content by delivering the right content to the right person in the right context at the right time. Nearly 4,400 of the world's leading companies, professional services firms, and governments have chosen Interwoven, including adidas, Airbus, Amnesty International USA, Avaya, BT, Cisco, Citi, Delta Air Lines, DLA Piper, FedEx, Grant Thornton, Hilton Hotels, HKMP LLP, Hong Kong Trade and Development Council, HSBC, LexisNexis, MasterCard, Microsoft, Samsung, Shell, Sky Italia, Qantas Airways, Tesco, Virgin Mobile, and White & Case. A community of over 20,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit [www.interwoven.com](http://www.interwoven.com).

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