

Taylor McCaffrey streamlines processes and accelerates productivity with new DMS

Quick Facts

Company: Taylor McCaffrey LLP

Challenges:

- Time wasted searching for documents in disjointed systems
- Limitations in functionality including audit trail visibility
- Legacy document management approach at odds with vision of integrated Microsoft ecosystem

Solution:

Contentworker by Formpipe

Results:

- On premise solution delivers high level of security and promotes compliance best practice
- Faster access to documentation enhances— productivity
- Improves document control and automated version updates
- SharePoint based system delivers consistency and integration with firm's Microsoft ecosystem
- Highly customizable design future proofs firm's document management needs
- Supports the firm's environmental ambition to use less paper



Established in 1966 and recognized as one of Manitoba's largest law firms, Taylor McCaffrey LLP sets the market standard for several core areas of practice including: civil litigation, labor, employment, corporate, taxation and family law.

The firm employs around 65 lawyers, along with over 100 support staff, and separates itself from the competition, not just in its commitment to upholding industry best practice at every turn, but in its multi-level strategic approach to client services. This allows the firm to assign lawyers with complementary practice area experience to provide legal expertise on tap that transcend the traditional confines of individual capabilities.

Both focused and formidable, Taylor McCaffrey has a reputation for excellence and a plan to continue to set the benchmark in the regional market, by embracing innovation and utilizing technology to future proof its business.

The business challenge: disjointed processes limits productivity & control

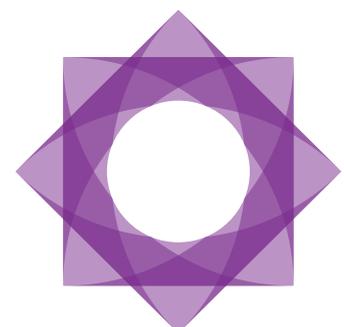
As with many industry peers, Taylor McCaffrey had relied upon a basic file share system, combined with individual email mailboxes, to save, store, amend and access its business documents. Although capable and compliant, this approach came with limitations. The lawyer-centric nature of the set up meant that locating all case specific documentation quickly and efficiently was often difficult.

Visibility could also be restricted. The incumbent method didn't provide quick and easy access to an audit trail. As such, it could be time consuming for lawyers to ascertain who had accessed, amended or deleted documents.

As a modern business that uses many Microsoft applications, the firm wanted its systems to integrate in order to optimise efficiencies and reduce the need for manual administration. The current approach to document management was unable to facilitate this ideal.

In a bid to streamline its operations, and create a matter centric, integrated model that would support the firm long into the future, Taylor McCaffrey decided to overhaul its approach to document management as Brad Saluk, the firm's IT Manager, explains:

“Our existing method of document management wasn't reflective of the firm's standing in the industry, and although manageable, didn't offer us a future-proofed solution. There were five separate files for production, archive and long-term archive related content. The infrastructure was basic and fragmented but also incredibly lawyer-centric. With the Law Society moving towards a matter-centric approach to auditing, we needed a new system that would accommodate this change and have fewer admin-based limitations.”



The solution: a centralized & integrated approach

In 2013 the firm began a project to establish its exact document management specifications and review appropriate solutions.

Taylor McCaffrey needed to be able to retrieve the right documents quickly and have 100 percent confidence in the integrity of the data contained within them. The firm also needed a system that would integrate with other Microsoft applications, share familiar interfaces to promote user uptake and deliver ongoing efficiency savings.

Not only would a new system need to form part of a wider Microsoft IT infrastructure, it would need to be hosted on premise, as the firm was keen to maintain a high level of security and control. If the internet connection was lost, the firm would be able to maintain access and ensure business continuity. A further consideration was the firm's environmental commitment to using less paper.

With so many boxes to tick and unique requirements to fulfil, the project team considered building its own bespoke software and engaged with several programming consultancies before deciding to limit its shortlist to existing applications readily available to purchase. However, the ability to customise a product to match specific processes remained, and further vendors were discounted due to their systems' inability to meet this demand, as Brad comments:

"What we needed was the best of both worlds: the convenience and reliability of a tried and tested 'off the shelf' document management system, coupled with the flexibility of a bespoke application. We wanted to invest in a system that wouldn't just meet our current requirements but could be customized and continuously developed, to effectively accommodate our evolving needs too."

After reviewing proposals and demonstrations from several large DMS vendors, Taylor McCaffrey opted for Contentworker by Formpipe. In 2017 the firm began a yearlong pilot to migrate documents from the various disjointed files into the secure, centralized system.

The results – fast & future proof document management

The implementation of Contentworker was completed in January 2018 with the firm since realizing core benefits relating to saved time and opportunity for enhanced productivity, in addition to increased security and reduced risk.

Because all documents are now stored in a central, Microsoft SharePoint-based location, the platform is

providing the firm with an intuitive, matter-centric workspace where documents can be accessed quickly and accurately using a content-based search, rather than by file name or subject title alone. Documents are organized in a structured and intuitive interface, instead of scattered in multiple locations in a lawyer-centric manner. Because Contentworker automatically assigns metadata to all documents, SharePoint's powerful search capabilities are being put to good use and are empowering users to find relevant documents in seconds. This in turn is promoting opportunity for optimized productivity as lawyers can refocus their time and effort into fee earning activity, instead of wasting time searching for the right file.

Taylor McCaffrey now has more control over its documents too. Not only is everything in one place, version control is automated by the system to remove the likelihood of error. Permissions and access rights are also in place to ensure that only approved personnel can view, amend or delete documents. In fact, this is one area that the firm utilized Contentworker's highly customizable design by adding an additional permission category (full control, no deletion) to the software's default protocols (read only, full control, deny). As the firm grows, and the number of documents generated increases, this robust security will help future proof the business. Equally, incorporating Taylor McCaffrey's feedback into the product roadmap and releasing quarterly updates, included as part of the support and maintenance contract, will continue to fine tune the system for users.

Summarizing the firm's experience, Brad said: "The people at Formpipe have been very professional, friendly, responsive and flexible to deal with. Contentworker best matched our criteria during the selection process and we have been very pleased with how the system has helped to transform our document management for the better."

"We haven't just bought software, we've invested in a partnership with Formpipe that has delivered secure, matter-centric document management, tailored to our unique business needs, and will continue to add value long into the future."

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