

Case study: LG



“The Williams Lea team presented the desktop solution to me, via a live demonstration. I was able to carry out searches using various parameters and was very pleased at its accuracy and scale. Now, with implementation complete, I no longer need to have my secretary contact the records department whenever I need a file. The desktop view I have of all my client and master files not only promotes best practice for all our lawyers but also enables much faster retrieval of our archived documents.”

Stephen Stephens, Head of Real Estate

Williams Lea has crafted a long-term solution that reduces our client's risk and improves profitability by organising information in a way that is easy to search, store and retrieve. Our contribution directly improves the effectiveness of lawyers' time, positively impacting profitability.

Lawrence Graham LLP (LG) is a firm of business lawyers, based in London, but with a global reach, advising clients around the world. Commercially-minded, entrepreneurial and results-orientated, LG is continually looking for effective solutions, that enable them to support the complex and fast-changing businesses of their clients.

Flexibility and accessibility are watch-words for the LG brand. As such they wanted a sensible and future-proof document management solution that would allow their business to move forward with confidence.

The challenge

The LG team wanted to simplify their document management, in order to free up time, resources and expertise to focus on their core, profit generating legal activities.

Specific objectives included:

- Saving time
- Reducing risk
- Transform records declaration
- Expedite search and retrieval processes
- Implement a complete information lifecycle
- Desktop tracking of all information requests

The solution

Working in partnership with systems provider – Hummingbird – Williams Lea embarked on a firm-wide deployment of LegalKEY Attorney Desktop.

With an office move just 12 months away, the firm saw the project as a great opportunity to improve control and reduce the risks associated with the processes involved in the creation, access and retrieval of paper based records.

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The initial installation improved management information and reporting functionality. This was followed by the installation of Integra software to provide an interface with the practice management system – this refreshed LegalKEY on a realtime basis.

A helpdesk and formal structure to process all records requests was introduced and combined with specific SLAs and intelligent barcoding on files and boxes. Each lawyer, secretary and records team member was given their own unique barcode to enable full traceability of files within LegalKEY at all times.

Training and education formed a critical part of the project plan. A pilot of 8 secretaries was used to test the system and begin selling the benefits internally.

Feedback gained during the pilot enabled Williams Lea to work with Hummingbird to tweak the look and feel of the system to achieve a perfect fit at roll out.

Service mix

- Litigation and IT support
- Management of central records
- Administration of live filing environments
- Training Assistance
- Change Management
- Vendor Management for off-site storage providers and EDRMS
- Desktop tracking of all information requests

Next steps

LG is a highly ambitious organisation, operating in a highly competitive space. They are continually looking at ways to improve their service capabilities and add value for their clients. As such Williams Lea are a partner committed to sharing a dialogue on further transformations of legal business processes

Key facts

A team of on-site records management professionals manage central record collections comprising:

- 100,000 boxes stored off site
- 60,000 deeds on-site
- 10,000 wills on-site

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