

&gt; Customer Success Story

## Legal Firm Looks to the Future of Collaboration with Clients

“The ways in which law firms are providing service is changing. At Aird & Berlis LLP, we have strengthened and enhanced our relationship with clients by providing better accessibility to the legal product and expertise of our lawyers in a collaborative environment.”

— Gary Torgis, Executive Director, Aird & Berlis LLP

### Business Profile

#### Industry

Legal

#### Organization

Aird & Berlis LLP

#### The Challenge

- > To implement a portal solution that would provide a secure platform for sharing documents and collaborating with clients

#### Hummingbird Solution

- > Hummingbird Enterprise™ Webtop
- > Hummingbird Enterprise™ DM

#### Key Benefits

- > High level of security
- > Better client relationships through collaborative capabilities
- > Reduced application integration costs

#### Future Plans

- > Further enhancements of client/firm collaborative environment
- > Transfer of all the firm's documents to the document management system
- > Integration of litigation software and reference resources into the portal
- > In-house development of e-Clip® plug-ins to integrate new software applications
- > Customization of the portal's interface to a “look and feel” unique to Aird & Berlis LLP

Aird & Berlis LLP (A&B) is a prominent, full-service corporate law firm with a large, diversified national and international practice. The Canadian-based firm represents some of the world's largest corporations as well as a wide array of entrepreneurial businesses, associations, government agencies, and individuals.

Gary Torgis, the firm's Executive Director, recognized that A&B's continued success was dependent upon utilizing the best current technologies to support its business strategies. He turned to Paul Knapp, Director of Information Technology, who was charged with the task of improving the firm's ability to deliver cutting-edge service to current and new clients.

The solution that they chose includes Hummingbird Enterprise™ Webtop, a next generation portal, and Hummingbird Enterprise DM™ to allow the firm to meet existing client collaboration requirements, while providing a highly flexible architecture enabling the firm to adapt to the dynamic requirements of the legal community. One of Knapp's key responsibilities was to ensure that clients have secure access to the documents they need and, if necessary, access to other applications.

“The way in which law firms are providing service is changing,” said Knapp, “Clients are starting to expect the accessibility and collaborative features provided by portal solutions like Hummingbird Enterprise Webtop.”

### Planning for the Future Spares Headaches Down the Road

The open, flexible architecture of Hummingbird Enterprise Webtop was a major factor in the firm's decision to purchase this product. “Future collaboration with our clients is going to continue to evolve in directions that we can't completely identify at the moment,” said Knapp.

Knapp was impressed with Hummingbird Enterprise Webtop as it has the capability to do whatever he needs in the future in terms of integrating new applications and enhancing functionality. “You certainly don't want to spend a significant amount of money and find out a year down the road your portal can't handle new software that's critical for your organization to remain competitive,” he said.

Before the portal was implemented, A&B lawyers and administrative staff collaborated with clients primarily through e-mail. This method of communication limited the size of files that could be exchanged and raised security concerns. “One of our criteria when deciding on a portal solution was airtight security,” said Knapp.

The ability to use predefined or custom-made e-Clip® plug-ins to extend the portal was also a key consideration. e-clip plug-ins are Hummingbird Enterprise Webtop components that integrate dynamic information such as e-mail inboxes or sales reports, as well as interactive services such as threaded conversation, online procurement, an employee directory, or data from enterprise applications and business systems into the centralized Web-based workspace of the portal.

A&B is working closely with Hummingbird partner AMH Communications, a consulting firm specializing in portal, document management, and knowledge management solutions for the legal vertical, to develop new customized e-Clip plug-ins.

## Clients Pleased with New Control They Have Over Documents

Implementing the portal has allowed the firm to give its clients more power over documents that are used in their legal matters. For example, clients supply A&B with templates for legal documents that require updating on a regular basis. In the past these templates were e-mailed to a clerk at A&B who copied them online to be updated. Now, customers can come through the portal using a custom e-Clip, designed by AMH Communications, to directly edit and update their own templates. "They have the security to replace any template putting the control along with tight security right into the client's hands," said Knapp. "We're definitely meeting with positive comments from our clients. There is no more confusion as to which template is the latest or if the correct version got updated. This uncertainty was cause for significant time to double-check to ensure accuracy in the documents that is simply no longer an issue. Our clerks know that they are working with the latest versions when they pull it out of the portal."

The firm has also integrated its pre-existing document management system from Hummingbird into Hummingbird Enterprise Webtop. Employees who need to access the firm's documents from remote locations go through the portal, accessing a Hummingbird Enterprise DM e-Clip. This approach eliminates the need to install Hummingbird Enterprise DM on each computer, saving money and IT resources. The firm is currently in the process of placing all of its documents into a centralized library that can be accessed from any location by authorized users. This technology keeps A&B at the leading edge of the industry where lawyers, staff, and clients have quick and easy access to all documents whether they are in the office, on the road, or at their home office.

In the near future A&B is planning to plug in a Microsoft Exchange 2000 e-Clip to allow users access to their e-mail from the same interface they use to access their documents. In addition, A&B plans to integrate "Citrix" into Hummingbird Enterprise Webtop to provide remote access to specific desktop applications. It would be most effective to have remote access to custom litigation software from a laptop in the courtroom rather than bringing boxes and boxes of evidence, opinions, and testimony into the courtroom.

Coupled with a strong search engine, this technology would allow the attorney to quickly call up relevant documents and print them out in the courtroom as required during the course of litigation.

With Hummingbird Enterprise Webtop in place, Torgis and Knapp are confident that A&B remains preeminent among the firms looking to leverage technology for competitive advantage.

Knapp has a message to other firms about to make such a decision. "Get off the fence. Firms that are not moving forward with software tools like Hummingbird Enterprise Webtop are quickly going to discover that they cannot remain competitive in the current and future marketplace."



### Corporate Headquarters

1 Sparks Avenue, Toronto, Ontario M2H 2W1 Canada  
Toll Free Canada/USA: 1 877 FLY HUMM (359 4866)  
Tel: +1 416 496 2200  
Fax: +1 416 496 2207  
E-mail: [getinfo@hummingbird.com](mailto:getinfo@hummingbird.com)

For more information, visit [www.hummingbird.com/us/ab](http://www.hummingbird.com/us/ab)

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