

&gt; Customer Success Story

## Brinks Hofer Gilson & Lione Rolls out Hummingbird Enterprise™, Gaining User Adoption with a Solution that “Sells Itself”

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— Rod Sagarsee, CIO, Brinks Hofer Gilson & Lione

### Business Profile

#### Industry

Legal

#### Organization

Brinks Hofer Gilson & Lione

#### The Challenge

- > Replace existing folder structure with document management system
- > Secure firm-wide user acceptance and adoption of the new technology

#### The Solution

Hummingbird Enterprise™

#### Key Benefits

- > Searches returned in seconds
- > Intuitive and user-friendly interfaces ease user acceptance and administrative operations
- > Ease of saving e-mail messages and attachments into document management (DM) system as fully text-searchable documents
- > Allows efficient collaboration between geographically dispersed offices and teams

Brinks Hofer Gilson & Lione is at the cutting edge of intellectual property law as one of the largest firms in its specialty with approximately 150 attorneys, supported by a full complement of scientific advisors, patent agents and paralegals.

Recently, the firm rolled out Hummingbird Enterprise™ DM across the organization to replace a folder-based approach to document management. The process of selecting a document management solution began with research into three competitive offerings. That was quickly narrowed down to Hummingbird and one other competitor, with Hummingbird emerging as the winner.

“Hummingbird was the clear choice. It didn’t take long to make the decision,” says Brinks CIO Rod Sagarsee, about the decision to choose Hummingbird Enterprise™. Several factors including total cost of ownership, Hummingbird’s approach to selling the solution and the intuitiveness of Hummingbird user and administrative interfaces were instrumental in making the decision.

The firm launched a pilot project with 30 users and five active cases. Within three weeks, 120 users and 17 active cases were on the system. Two months later, Hummingbird Enterprise was rolled out to the entire firm and four months after the project was launched, hundreds of client case numbers and matters and more than 200,000 documents were in the system.

### More Flexibility Doesn’t Mean Greater Costs

One of the key reasons that Brinks chose Hummingbird was the availability of multiple user views, including a Windows Explorer environment, an Outlook view and a remote, web browser environment in one package. The competition also offered similar views but only as separate packages. At first that seemed like a good deal to Sagarsee, but because the firm wanted to provide its partners and employees with as much flexibility as possible in accessing the system, it became clear that Hummingbird was offering a superior configuration.

“Right away I knew that Hummingbird would be more cost effective. With the separate packages offered by the competitor, there would be separate maintenance, separate upgrades, separate packages, and our own internal maintenance would have been more expensive in the long run,” says Sagarsee.

The firm was also able to reduce costs in third party consulting fees. Brinks engaged DOCMan Technologies to help with the initial installation and deployment of the system as well as another third party consultant to help with developing an optimal profile form for the firm. The system’s flawless operation means that the firm has been able to save about half of the original consulting budget. According to Sagarsee, implementing the DM system from a software and hardware standpoint ended up being “a piece of cake.”

## System's Stability a Bonus for IS Team

"I was very impressed with its backend, the way that they've structured the servers and the software. We have literally not had one hiccup on that system. It has worked flawlessly," says Sagarsee. "It's very stable."

Sagarsee continued: "The backend management and maintenance of this system was a big factor because it is so user-friendly and self-intuitive. My team built and customized the Hummingbird remote desktop within two days. It is more flexible and user-friendly than the other offerings."

The cleaner and more user-friendly Outlook interface to Hummingbird Enterprise was another key selling point. "We liked the fact that you could take any attachment from an e-mail message and drag it right into the DM system as a fully text-searchable document. That was a huge benefit," says Sagarsee.

## A Primer on Ensuring User Adoption

The process of rolling out the document management system proceeded from pilot to full implementation very smoothly because of the firm's approach to ensuring user acceptance. Moving a large workforce from reliance on storing documents in a folder structure on corporate servers and local drives to a document management system requires some forethought to ensure a smooth transition.

"It's a culture change and effecting that change was probably the most significant task for us," says Sagarsee. The firm's IS team along with its Technology Committee, identified four cases that would be transferred to the system in the pilot phase. In each case, the lead attorney was actively engaged in helping with the transition. The lead attorneys sent out e-mails to their team members, informing them that the IS team was getting ready to import all relevant case files from a local drive and that local drive-based files would become read-only, thus requiring staff to use the DM system exclusively.

Shortly thereafter, a training session was held with each individual case team using their own case files as examples in order to bring the concepts of DM home to them more effectively. "We had some skeptical individuals at first, but we challenged the system in the training sessions," says Sagarsee. "We'd say, 'give us a name of a judge or expert witness in one of your cases and we'll show you how easy it is to locate the files where those names are mentioned.'" As people called out names, the IS team conducted searches that returned results within seconds.

"That was very impressive to the trainees," says Sagarsee. "And, it started a word of mouth buzz within the firm. Every time we had lead shareholders sit in a training session, they would stay afterwards and say 'okay, I want this case and this case in this system.' Basically, the system actually sold itself." Building on the success of the pilot project, the IS team ran advertisements on TV sets located in the firm's lunch room that alerted employees to upcoming training sessions, explained the benefits of the DM system and imparted handy tips on how to use the DM system effectively.

## Developing New Process and Supporting Old Ones

Hummingbird Enterprise is now being used across the firm. All new active cases are immediately opened within the DM system and all existing active cases should be on the system by September. Also, the firm now has the capability of OCRing millions of PDF documents into the system to make them fully text-searchable. This will improve the firm's ability to locate important information in the future.

Many functional departments within the organization are also using the DM system, including the docketing, accounting, marketing and recruiting departments. In addition, Sagarsee's IS team is using the DM system to track help desk tickets. The team has built a special profile form that automatically populates itself with information from e-mailed help requests. The only thing that the team has to fill in is a description of the solution to the issue. This makes it much easier for the team to recall solutions to rare problems by simply searching the DM system for similar occurrences. It also makes it easier for the team to track statistics on recurring help desk issues as well as to see who generates the most requests for help.

Several projects are in store for the future, including a knowledge management system based on the portal component of Hummingbird Enterprise. Sagarsee and his team are not done with using Hummingbird Enterprise to its full potential.



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