

> Customer Success Story

Drinker Biddle Improves Information Flow with LegalKEY® Practice Support Solutions

“With LegalKEY Practice Support, it’s point, click, find a report and, bingo, you’ve got results. Response time is much quicker.”

— Mary Hamm, National Records Manager, Drinker Biddle & Reath LLP

Business Profile

Industry

Legal

Organization

Drinker Biddle & Reath LLP

The Challenge

- > Centralize legal records management using one system to centrally manage both physical and electronic files by replacing several existing legacy products
- > Meet evolving records management and conflicts clearing needs of a large and rapidly growing legal practice

The Solution

Hummingbird Enterprise™ for Legal
— LegalKEY® Practice Support Solutions:

- > LegalKEY Records Management™
- > LegalKEY Conflicts Management™

Key Benefits

- > Streamlined processes and lower cost of ownership via seamless integration with existing third-party systems, including Thomson Elite® and Dun & Bradstreet®
- > Reduced risk with overall better conflicts management system that allows support staff to conduct flexible, complex, yet simple searches and deliver results faster than before
- > Real-time access to records across the dispersed repositories throughout the firm

Drinker Biddle & Reath LLP, established in 1849, is one of the nation’s oldest law firms. This full service national law firm has grown to over 450 attorneys in ten offices across the country and sees further growth on the horizon. Historically, the firm had a decentralized records management regime, using several competitive products in various offices.

Why LegalKEY Practice Support?

In order to meet its current and future needs, Drinker Biddle needed to implement a uniform records management process across all ten offices. At the same time the firm wanted more comprehensive conflicts searching capabilities that would deliver conflicts reports that were easier for the attorneys to read and assess. The conversion to LegalKEY combined all the competing records sources into a single database, allowing the firm to work as one entity with a synchronized firm-wide records management, retention policy and conflicts management system.

“It’s the 21st century,” says Nick Rodia, Manager of Client Intake at Drinker Biddle, contextualizing the firm’s decision to implement a new practice support solution. “You don’t really have a whole lot of options.”

Drinker Biddle’s key requirements for a new records management solution included compatibility with plans for future expansion, long-term records and conflict needs, features and functionality, as well as the vendor’s focus on the legal industry and responsiveness to requests for product improvements.

“We had several existing legacy systems, and were adding new ones with each merger. It just wasn’t making a whole lot of sense to keep things the way they were. We needed to move to one up-to-date system that could handle everything,” says Rodia. “With clients being served by teams of lawyers based in different offices, you have to be able to share information effectively.”

While Drinker Biddle’s time and billing system was excellent for accounting purposes, it did not provide the features and functionality required for long-term records and conflicts checking needs. Two things about Hummingbird stood out — its focus on the specific requirements of law firms and the stellar conflicts management capabilities of LegalKEY.

“We had the sense that the Hummingbird team really listened to requests coming from customers,” says Mary Hamm, National Records Manager at Drinker Biddle, who used LegalKEY practice support software at a previous job. “They kept the product evolving along with its market and we knew that our requests would be acted on quickly.”

Efficiency Gains, Improved Information Flow

Since implementing LegalKEY, records staff at Drinker Biddle have become more efficient in their work. “There are a lot more options on how you can organize records, matters, files, and other elements,” says Hamm. For example, the firm uses LegalKEY Records Management to create virtual case rooms where folders and correspondence related to a case can be easily accessed.

Producing highly tailored reports through LegalKEY Records Management is also a snap. “The reporting capabilities of LegalKEY Records Management are a big plus; it is very easy to access and use. In the past, we had to go through all sorts of contortions to produce reports. Now we can see things much better and generate reports to match,” says Hamm.

The records management module allows a vast array of reports to be produced, as well as the ability to easily implement retention policies and procedures. The system is designed to minimize risk and to accommodate multi-tiered retention and destruction policies and risk management protocols.

Users can search for files based on infinite criteria against any record and the system will provide comprehensive lists, making documents easier to find and retrieve. Records can be traced much more quickly since each one is attributed to a specific lawyer and all history can be recorded down to specific lawyer level.

Protecting the Firm’s Interests — and Those of its Clients

Conflicts management is a vital component in any firm’s actions to protect itself from malpractice claims and loss of reputation over inadvertent infringement on client interests. LegalKEY Conflicts Management allows the firm to capture information about new clients, matters and parties and to access detailed information when new business is searched for conflicts.

The flexibility and real-time indexing of information are also core benefits of LegalKEY Conflicts Management. “We are now able to provide our attorneys with a more thorough, easy to understand conflicts report,” says Rodia. “What’s best about the system is that we can turn around conflict reports quickly and accurately, that’s the key.”

Another useful function of the conflicts management module is the elimination of redundant party information via the Standard Party Cleanup utility. This tool searches records for variations of party names and amalgamates them all into one standard party.

Integration with Business-critical Systems and Products

LegalKEY Practice Support offers integration with key business tools used by Drinker Biddle such as the Thomson Elite accounting system (other leading time and billing systems are also integrated), Dun & Bradstreet, online integration with the U.S. Treasury Department’s Office of Foreign Asset Control/Specially Designated Nationals list (OFAC/SDN) for Patriot Act compliance, and others.

“It’s an increasingly interrelated world we operate in. These integrations allow us to be more complete, more thorough in what we are telling the attorneys,” says Rodia. “It gives them a whole new comfort level since they can be confident that we are providing them with good, sound, accurate information on which to base their decisions.”

Seamless integration with Thomson Elite allows the firm to replicate all new and updated information from the time and billing system with LegalKEY on an automatic schedule. It captures new matter numbers, client names, attorney names, addresses and other information. Integration with document management solutions like Hummingbird Enterprise™ DM gives Drinker Biddle the flexibility to move to a business environment where documents and records are increasingly kept in an electronic rather than paper format.

Intuitive Interface for Casual Users

While LegalKEY Records Management and Conflicts Management components are used mostly by specialized support staff, all employees have access to information through the Attorney Desktop interface, as well as Microsoft® Outlook, an important benefit. Casual users can view detailed information on existing records, request delivery or creation of records, and print basic reports.

“Its functionality is incredible,” says Hamm. “It allows everyone across the firm to have real-time access to any information and make requests for records without giving them the full rights to create or delete records that a records manager might have.”

Ease of Use and Responsiveness

The system is easy to navigate while searching and categorizing flexibility accommodates different work styles. This flexibility is especially important as it enables the firm to satisfy regional and practice area nuances that come into play as it continues to expand and acquire other firms.

“Response times are a whole different story with LegalKEY Practice Support. We can give people answers more quickly, in fact we can give people answers now that they couldn’t even get in the past,” says Hamm.

The increased responsiveness frees up records and conflicts staff to handle more requests for information. “We’ve got requests coming at us from all angles, and the firm is growing,” says Rodia, “yet we are able to keep them all happy with the staff that we have. That in and of itself is great.”

The benefits flow through all the way to the client. “When we take good care of our attorneys, the paralegals, and the secretaries, there’s a domino effect in their ability to serve their clients more effectively. You can offer more options to the attorneys on how to organize files, how to find information, how to track information, that’s a big plus,” says Hamm.



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