

Case Study



**LEONARD
STREET
AND
DEINARD**

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Leonard Street and Deinard Achieves its Matter-Centric Vision with Interwoven

Founded in 1922, Leonard, Street and Deinard has a long tradition of delivering innovative legal services to clients. Internally, the firm's clear vision for the best way to organize its practice has at times left its technology providers scrambling to keep up. In recent years, Leonard, Street and Deinard's staff of 180 attorneys, plus paralegals and secretaries, had become frustrated with the difficulty of organizing and finding the content their work depended on. Their systems didn't support grouping related documents of different types, so people had to look in several places to find all the content on one matter. "We created searches for them, but it wasn't the easiest way to work," recalls Terry Pressley, director of IT, Leonard Street and Deinard. "With about 1.5 million documents in the system, that's a lot of sifting." As long ago as 1999, the firm knew exactly what its staff needed: a matter-centric document management system that would support organizing documents of all kinds by matter within unified folders, along the same model as traditional physical files. At the time, no such solution was available. "We had to wait until somebody got it right," says Pressley, "and then Interwoven finally did."

Finding a technology partner for the long term

Interwoven WorkSite made Leonard, Street and Deinard's decision easy. The solution's matter-centric collaboration model was a perfect match for the firm's longstanding document management vision. Interwoven's integrated e-mail management—allowing staff to drag messages directly from their in-boxes to a matter-centric WorkSite folder—stood out

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from the competition. More broadly, "Interwoven is innovative and listens to customers, and the WorkSite product is solid, mature, and well-integrated," explains Pressley. "We were confident the company could keep pace with us as a long-term business partner."

Following a series of town hall meetings featuring an Interwoven demo, the firm's staff and partners had only one reaction: this is what we need—when are we going to do it? While Leonard, Street and Deinard planned its implementation carefully, its guiding philosophy was one of openness and flexibility. Anyone in the firm would be allowed to create a new folder in any area; attorneys and staff volunteers from each of the firm's practice groups and administrative departments designed the template workspace for their group. Simplicity was also a key factor, to ensure complete adoption.

In March 2006, Leonard, Street and Deinard and Interwoven partner ADV rolled WorkSite out to a pre-pilot group, then started a formal pilot. At the end of the month, ADV and Leonard, Street and Deinard converted the entire firm—four offices and 400 users, as well as more than 1.5 million documents—to WorkSite over a single weekend. "It went very well," says ADV's Bryce Ostenson. "The firm had communicated extensively with everyone at Leonard, Street and Deinard throughout the project, and it really prepared people for the change." To get the organization ready for WorkSite, the firm decided on a voluntary training approach that consisted of two training sessions three weeks prior to the introduction. The first 45-minute "Need to Know" class was followed by a 45-minute "Nice to Know" class.

Matter-centric vision becomes a reality

Interwoven WorkSite now serves as Leonard, Street and Deinard's definitive repository for electronic information, from

Industry

Legal

Geography

Minneapolis, St. Cloud and Mankato, MN and Washington, DC

Challenges

- Organize the firm's 1.5 million documents for faster, simpler access
- Group related documents—no matter what type—together, so that there's one place to look for everything
- Foster collaboration by enabling users to search firm-wide work content more effectively
- Improve alignment between paper and electronic records

Benefits of Using Interwoven

- Attorneys find all document types faster and more efficiently in electronic matter folders
- Collaboration improved through a firm-wide organizational model for work
- Common folder structure for paper and electronic records establishes foundation for more efficient records management



Solution

Interwoven WorkSite 8 powers electronic matter folders for Leonard, Street and Deinard. The Interwoven solution provides integrated document management and e-mail management within a single environment, making it easy for the firm's professionals to manage, store, and collaborate efficiently—from any location. Integration with the firm's time and billing system and structural alignment with its records management system further extend the solution's benefits.

work-in-progress and final documents to e-mails and voicemails. The solution's open architecture also makes integration possible with other firm systems, for more efficient data exchange; when staff set up a new client matter in the firm's time and billing system, WorkSite automatically generates a corresponding matter workspace, using the specific law code to pre-populate a template with the appropriate folders and database paths. The firm is also implementing a scanner to file external materials, such as interrogatories, into WorkSite within the same matter-centric environment.

With the system in place, Leonard, Street and Deinard attorneys, paralegals, and secretaries in any location can search and access content far more easily than before. "It's a fundamental change in the way we operate," says Pressley, who observes that the system's flexibility has accommodated a broad range of preferences. "Some of our users prefer a strictly hierarchical structure, accessing content by navigating through folders. Others prefer to search. Both types can co-exist easily in WorkSite, and find what they're looking for with equal speed either way."

Supporting a culture of collaboration

WorkSite has helped Leonard, Street and Deinard build stronger, more efficient collaboration by providing a uniform organizational scheme for all matter content. Attorneys, paralegals, and secretaries know exactly how and where to file any document, and they also know where to look for the content they need. "A construction attorney went to a site and took 20 photographs, then popped them into a folder," says Pressley. "Now all the attorneys on that case can see them. That's powerful stuff." Another young attorney used WorkSite to impress a client with the firm's capabilities, showing how quickly he could find any given item the client might want to see.

Laying the foundation for better records management

Like most law firms, Leonard, Street and Deinard faces the challenge of managing rising volumes of both electronic and physical records. Back in 2000, the firm created a file structure within its physical records management system that was intended to serve as a common model for records of both types. This model provided the starting point for the firm's matter-centric implementation. "It's a good working model that users understand now, and it also lays the foundation for closer alignment moving forward," explains ADV's Ostenson. When a matter closes, the firm's RM and Conflicts group harvests both physical and electronic documents—a process greatly simplified by the close alignment of the two systems.

As always, Leonard, Street and Deinard continues to look to the future. The firm's intention has always been to make its document management system available through its portal—not only for internal users, but also for clients. Interwoven's close relationship with Microsoft and its integration with the SharePoint server provided yet another key driver in the firm's decision to move forward with WorkSite, and its personnel and clients will soon reap the benefits. Having finally found a technology partner capable of making its vision a reality, Leonard, Street and Deinard will continue to pioneer best practices and cutting-edge service.

Interwoven is a global leader in content management solutions

Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments.

Our unique approach combines user-friendly simplicity with robust IT performance and scalability to unlock the value of content.

Today, nearly 3,800 enterprise and professional services organizations worldwide have chosen Interwoven, including: adidas, Airbus, Avaya, Cisco, DLA Piper, the Federal Reserve Bank, FedEx, HSBC, LexisNexis, Microsoft, Samsung, Shell, Samsonite, White & Case, and Yamaha. Over 18,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit www.interwoven.com.

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