

# Success Story

## Brinks Hofer Gilson & Lione Gains User Adoption with a Solution that Sells Itself

### Open Text eDOCS Offers Improved Information Access and Web-Based Collaborative Workspaces to Help Streamline Firm-Wide Processes

Founded in 1917, Brinks Hofer Gilson & Lione is at the cutting edge of intellectual property law. It is one of the largest U.S. firms in its specialty with approximately 150 attorneys, supported by a full complement of scientific advisors, patent agents and paralegals.

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*Rod Sagarsee,  
CIO, Brinks Hofer Gilson & Lione*

In 2005, the firm rolled out a document management (DM) solution from Open Text across the organization to replace a folder-based approach to document management. The process of selecting a DM solution began with research into three competitive offerings and was quickly narrowed down to a single vendor.

"This was the clear choice. It didn't take long to make the decision," says Brinks CIO Rod Sagarsee, about the

decision to choose Open Text eDOCS DM. Several factors including total cost of ownership, the vendor's approach to selling the solution and the intuitiveness of the solution's 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 Open Text system. Two months later, it 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 DM system.

"From a case standpoint, we have had a great success with more and more attorneys taking advantage of the system and putting their entire cases and documents in DM. And from the support staff level it has grown like wild fire as people very quickly saw the advantages of it. The paralegals and the secretaries live and die by it as well as different departments at the firm. It's been very successful," says Sagarsee.

Many functional departments within the organization are using the DM system, including the docketing, accounting, library, business development 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 emailed 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.

#### More Flexibility Doesn't Mean Greater Costs

One of the key reasons that Brinks chose the Open Text software was the availability of multiple user views, including a Microsoft® Windows® Explorer environment, a Microsoft 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

#### Industry

Legal

#### Customer



#### Business Challenges

- Replace existing folder structure with document management system
- Secure firm-wide user acceptance and adoption of the new technology
- Improve ability to access and share information
- Replace home grown Extranet site with a secure Web-based workspace for true collaboration

#### Business Solution

- Open Text – eDOCS DM
- Open Text – eDOCS Collaboration

#### Business 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 system as fully text-searchable documents
- Provides geographically dispersed teams and clients with access to information via personalized Extranet sites, improving client service levels

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Experts... we do!*

provide its partners and employees with as much flexibility as possible in accessing the system, it became clear that this solution was offering a superior configuration.

“Right away I knew that this implementation 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 was 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 remote desktop within two days. It is more flexible and user-friendly than the other offerings.”

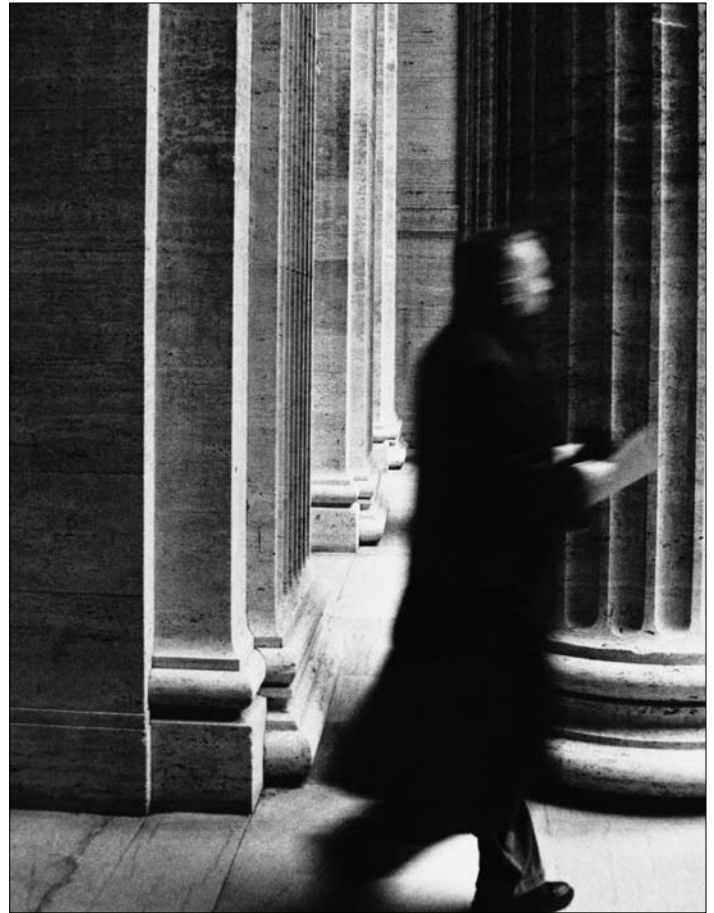
The cleaner and more user-friendly Outlook interface of the Open Text solution was another key selling point. “We liked the fact that you could take any attachment from an email message and drag it right into the eDOCS DM system as a fully text-searchable document. That was a huge benefit,” says Sagarsee.

## 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 has probably been the most significant task for us,” says Sagarsee. “We held training sessions 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. 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 system effectively.



## Developing New Process and Supporting Old Ones

The content management solution is now being used across the firm. All new active cases are immediately opened within the eDOCS system and all existing active cases will also be saved in the system. 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.

Usage of the DM system continues to grow at Brinks. “We’ve done an analysis every year since putting in the system. The growth percentage between 2005 and 2006 was 30%, and one year later, between 2006 and 2007, the growth percentage grew to 62%, so you can see that the popularity of DM is skyrocketing,” says Sagarsee. “DM is not going away...it is only going to get more popular as we add more features and capabilities to the system.”

## Open Text – eDOCS Collaboration Helps Firm Increase Level of Client Service

With the success of DM, the firm wanted to continue to build on its IT operations and enhance the Extranet site to help maintain and strengthen its client relationships. Using Open Text eDOCS Collaboration, Brinks has implemented a Web Extranet system which provides electronic “data rooms” that facilitate real-time collaboration with attorneys and clients no matter where they are located around the world. “The use of the eDOCS Collaboration module has been a great addition to the initial implementation. Today, we have approximately 40 of our top clients with access to their own customized Extranet site,” says Sagarsee.

Before deploying eDOCS Collaboration, Brinks implemented a homegrown HTML Extranet site that basically enabled clients to upload and download files into folders. However, the firm soon realized that this internally developed site was not ideal after seeing how the mail system would bog down when clients emailed large files to the site. As an alternative, the firm created its own Extranet system that would allow users to go to a secure FTP site to upload and download files, but found it still did not offer all the collaboration capabilities Brinks required to help enhance client service.

“We wanted a site where we could share documents, calendars and events and other information that we associate with true collaboration, between our clients and attorneys. We heard about eDOCS Collaboration when we were putting in DM, took a look at it, and found that it offered us exactly what we were looking for,” says Sagarsee. “We tested the site with some of our larger clients and they loved it. We feel that our clients should be able to access their information when they want to and the eDOCS Collaboration module from Open Text allows them to do that.” With the Extranet functionality, Brinks is able to provide attorneys, clients and other parties, 24x7 private, secure access to share and edit sensitive documents, collaborate on important topics, share calendar and contact information, specify important tasks and deadlines, and more.

eDOCS Collaboration offers Brinks an extremely secure repository to ensure that only authorized participants can access sensitive information. Image renditions of documents can be served up so that third party users do not have access to native documents. Access rights to folders and participant visibility can all be controlled to maximize workspace security. In order to ensure content security and participant privacy when required, the firm uses features such as “non-copyable” documents, watermarking and member visibility restrictions to provide complete flexibility and control over collaboration documents.

## Looking Ahead

Several projects are planned for the future that Sagarsee is confident will help increase DM usage at Brinks, including an upgrade to the latest release of eDOCS DM which offers Office 2007 and Windows Vista® integration. The firm is also considering Open Text’s new Legal Information Management SharePoint® Edition to leverage the enterprise search capabilities. This solution promises to help reduce the amount of time it takes attorneys to track down information that is stored on multiple systems throughout the law firm.

Features found in Legal Information Management extend information search and retrieval capabilities to provide an optimized experience for attorneys. The SharePoint platform will allow Brinks to aggregate all the content and information that is stored in its network and will make it easily searchable through the familiar SharePoint search pane. As a result, all documents, financial information and analytics associated with those financials, CRM information, and the LegalKEY suite of information for conflicts and records management can be readily accessible from one centralized view. This will eliminate the need for attorneys to conduct multiple searches across various sources to build a comprehensive list of desired information.

“I think the enterprise search capability is going to help us tremendously in the future in helping lawyers to get at the right information in short order,” says Sagarsee. “Getting all the information from multiple systems and matter sites would certainly be beneficial to the attorneys.”

Another important factor is ensuring the familiarity and ease of use of matter sites and collaborative solutions. As with any technology in law firms—from billing systems to calendaring applications and document management solutions—the sites must be highly intuitive and flexible because most lawyers do not want to spend time learning new technology.

With the help of Open Text, Sagarsee and his team see a bright future for the firm.



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