



## Legal Firm Invests in Service Quality with Client Extranet and Collaboration Tools

### Overview

**Country or Region:** United States

**Industry:** Professional services

### Customer Profile

With nine offices, 500 attorneys, and 700 other professionals and staff, Philadelphia, Pennsylvania-based Blank Rome is a full-service law firm that provides counsel to companies in a variety of industries.

### Business Situation

To foster the delivery of exceptional services, Blank Rome wanted to offer its professionals a richer collaboration and communication environment for interaction with clients and one another.

### Solution

The firm deployed a solution based on Microsoft® SharePoint® Products and Technologies and unified communications products and now is piloting a solution based on Microsoft Office SharePoint Server 2007.

### Benefits

- Better internal collaboration
- Higher quality of work and lower risk
- Increased work force efficiency
- Timelier access and service for greater client satisfaction

“Staying current with the Microsoft technologies that facilitate both internal and external communications helps us remain at the forefront of client service in the legal industry.”

*Al Krachman, Senior Partner, Blank Rome*

Blank Rome wanted to simplify attorney collaboration on client matters to ensure the highest-quality service. The law firm invested in a portal that was based on Microsoft® SharePoint® Products and Technologies, giving attorneys access to a range of information specific to each client matter from one view. Blank Rome added extranet portal capabilities to share relevant information directly with clients. Centralizing matter information has made it easier for groups to coordinate service delivery for complex client matters and to collaborate without regard for geographic location. Extranet collaboration has accelerated the firm’s ability to respond to client inquiries and share critical information rapidly, enhancing the client experience. In 2006, Blank Rome upgraded to Microsoft Office SharePoint Server 2007, further extending the firm’s culture of collaboration to clients and co-counsel.



## Situation

Philadelphia, Pennsylvania-based Blank Rome is a rapidly growing Am Law 100 law firm, with 500 attorneys and 700 other professionals and staff in nine offices from New York to Florida. The firm provides services in more than 20 practice areas, ranging from business restructuring and bankruptcy to estate planning and government relations. Blank Rome also deals with clients in a large number of industries, including maritime, energy, and healthcare. The firm has handled public and corporate transactions, litigation, and regulatory issues for more than 60 years.

Blank Rome maintains a leading position in its industry by anticipating the needs and expectations of its clients. As clients have become more technically savvy, Blank Rome has established itself as a forward-thinking firm that uses technology to streamline processes and increase service levels to clients.

The law firm has been building on its technology foundation for many years, staying ahead of the curve and basing its decisions about which solutions to implement on its assessment of business needs. In 2002, after attorneys expressed concerns regarding the difficulty of searching for information, the firm realized that recent technology could help its attorneys and staff improve matter management.

### Finding the Right Information

Blank Rome maintained seven separate libraries, which complicated the search for information. In addition, its document repository from enterprise content management solutions provider Interwoven contained more than 5 million documents. Attorneys also stored relevant documents in their Microsoft® Outlook® 2000 messaging and collaboration client systems, which meant they had yet another place to search for needed informa-

tion. “Our attorneys had to switch between applications and look in so many places that it was difficult for them to be sure that they had gathered all relevant matter,” says Dave Sampieri, Systems Development Director for Blank Rome.

### Working Together Efficiently

The firm also was looking for a better way to facilitate cross-firm collaboration. Blank Rome attorneys work on cases according to their areas of expertise rather than their locations. To work together on a case, the geographically dispersed attorneys relied on phone calls and e-mail messages with attached documents, but such communication often produced confusion as to what was the most current information, presented obstacles to coordination, and resulted in lag times. Explains Larry Liss, Chief Technology Officer for Blank Rome, “Our attorneys need to quickly and easily pull together a complete set of information and all the right contacts for each case, and we wanted to give them more advanced tools for working together.”

### Communicating with Clients

Blank Rome also realized that newly available technology could provide its clients with online, self-service options that would help them get the documents that they needed—when they needed them. “Working with our clients could be relatively asynchronous, with a lot of phone calls and e-mail exchanges required to get the information where it needed to be,” says Liss. “Some clients used to call numerous times, requesting the same document because they couldn’t find it or had deleted it. It took extra attorney time, and, at the same time, our clients had to wait for attorneys to be available to send them the documents they wanted.”

Another issue for Blank Rome was that sending a document through e-mail wasn’t necessarily a secure way to transport it. “We’re always concerned about maintaining

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Chief Technology Officer, Blank Rome

strict confidentiality, so we wanted to offer our clients a more secure means of receiving documents,” says Sampieri.

### Solution

Rather than adding a host of new solutions to its environment, Blank Rome wanted a single system that would provide better client service; improved cross-firm collaboration capabilities; and one accessible, searchable location where everyone in the firm could find complete, relevant information.

In May 2002, Blank Rome began exploring its options. “We had talked about portal alternatives, such as Plumtree solutions,” says Liss. “But none of the systems that we saw could integrate with other necessary applications, including our Interwoven document repository and certain legal industry-specific Web parts and services such as those provided by XMLAW.”

At that time, Blank Rome learned of Microsoft SharePoint® Portal Server 2001 at a seminar for the legal services industry. “What struck me most was the phenomenal potential for increasing the productivity of the people who were building as well as using the portal sites,” remembers Liss. “The capabilities of Microsoft SharePoint Products and Technologies were unlike anything that I’d seen.”

### Establishing an Intranet

By November 2002, Blank Rome had decided to deploy a SharePoint Portal Server 2001 solution, dividing the intranet into a law practice group side and an administrative side. The practice group attorneys recommended that commonly sought documents and templates, group calendars, and announcements related to new clients or case outcomes be made more easily accessible by placing those items on designated intranet sites. Those on the administrative side—including paralegals, secretaries, and human resources staff—sought to improve the accessibility of non-

case-related information that applied to the firm as a whole.

The new intranet went live in January 2003. It is made up of a home page; an area called Blank Rome Life, where employees share information about weddings, births, firm announcements, and upcoming events; and a page for each of the five administrative departments. Initially, the intranet also included five practice group sites, but Blank Rome soon expanded the intranet to include sites for the firm’s more than 20 practice areas.

### Reaching Out to Clients

Blank Rome waited to create an extranet until the release of Microsoft Office SharePoint Portal Server 2003. Recalls Liss, “We saw that Microsoft had made huge strides in developing SharePoint Portal Server 2003 and that it would be to our advantage to stay up-to-date because SharePoint Portal Server had become an integral part of the Microsoft infrastructure.”

Although the firm generally makes its documents accessible to all internal users, the question of confidentiality arose when Blank Rome began developing its extranet sites for clients. The firm needed to determine the best way to restrict extranet users to see only the documents that applied to them without the firm having to go back and redo each document’s security setting. Blank Rome resolved the issue by using third-party integrated Web parts from legal-industry solutions provider XMLAW, which maintain the security settings already established in the document repository.

The Blank Rome IT group created a number of templates for the firm’s extranet sites, all of which involve search capabilities for password-enabled clients. “The templates range from simple to complex, but we can build a new extranet site within five minutes, populating it with the requested contact

information, shared documents and calendars, and lists," says Sampieri. "It's that easy."

### **Upgrading the Intranet**

As it created its extranet, Blank Rome also began upgrading its intranet to SharePoint Portal Server 2003. "We made the decision to use SharePoint Portal Server 2003 as the development environment for all new projects whenever we could," says Sampieri. One of the first new sites built was in response to a business request from the Blank Rome finance department, which needed a way to track the thousands of taxi vouchers that attorneys receive and use every year. The department knew that a large percentage of the vouchers could be billed to clients, but it needed the IT staff to develop an application to help it do so. "Using SharePoint Portal Server 2003, we built an intranet site where attorneys can list their vouchers and associate them with client or job numbers. The data is automatically uploaded to the firm's finance system," explains Sampieri.

The upgraded intranet provides a window to the document repository, with pointers to documents and document folders. SharePoint Portal Server 2003 delivers a consolidated view of the firm's document management system, which contains client matters. The intranet also links to the firm's knowledge management system, West km from Thomson Elite, and to a shared calendar for upcoming events such as court dates. In addition, because the intranet contains links to InterAction—the firm's customer relationship management (CRM) system from LexisNexis—the firm's staff can conduct quick searches for client information. The link to InterAction also means that when a staff member starts a new document, it is automatically populated with the correct client contact information.

"We designed the intranet so that users' security levels determine how deep users can go in the various subsites," says Sampieri. Blank Rome also is considering adding a dashboard that would allow partners to see the financial and operational status of clients, matters, and all personnel working on a case.

### **Providing Real-Time Communications**

In 2005, in the spirit of delivering up-to-the-minute communications capabilities to enhance client service even more, Blank Rome implemented a Microsoft unified communications solution that involves instant messaging and presence awareness. Adopting unified communications capabilities helped reduce attorney disruptions. While on the phone, attorneys needed a less intrusive way for their secretaries to announce another call or ask a question, and the attorneys are deluged with e-mail messages already, so they generally didn't see time-sensitive messages soon enough to respond. Receiving an instant message presented a more subtle, effective alternative.

The firm began on a pilot deployment of Microsoft Office Live Communications Server 2003, and in 2006 it upgraded to Live Communications Server 2005 and Office Communicator 2005 to take advantage of desktop video capabilities. "Our senior-level executives like to see the people with whom they're working, which can be a challenge across multiple offices," says Liss. "Live Communications Server gives us real-time video capability, so executives feel as though they're sitting in a room together, even if they're hundreds of miles apart."

Another feature of the unified communications solution is presence awareness, in which attorneys working on a document in any Microsoft Office Professional Edition 2003 program can view real-time information about the original author of the document or others who are relevant to it. The presence

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feature shows whether those people are available to answer questions or collaborate as well as the best way to reach them (instant message, e-mail message, or phone call). “Presence awareness is definitely catching on with our users,” says Sampieri.

#### **Upgrading to Microsoft Office SharePoint Server 2007**

To further its collaboration goals, Blank Rome currently is evaluating beta releases of Microsoft Office SharePoint Server 2007 and the next version of Microsoft Windows® SharePoint Services with the intent of migrating all intranet and extranet sites immediately after the production release of those technologies. “We want the latest version of the solution because it includes more functional templates and enhanced integration with Microsoft Office programs, which we expect will present even greater opportunities for efficiency,” says Liss.

The entire firm is already benefiting from a test intranet site, which Blank Rome developed using Office SharePoint Server 2007 in response to a business request from attorneys to somehow limit the number of e-mail messages that they were receiving. Attorneys were distracted by the frequent interruptions about non-client-related matters such as training events, kitchen announcements, and other general administrative communications that interrupted their thinking throughout the day. The new test site now generates one firm-wide e-mail message each day at 16:00 that summarizes that day’s announcements and links to the related details.

Other elements of the evaluation include a site for tracking all firm contracts, leases, and agreements for office space, equipment, and software; a workflow for management change requests in the IT department; and the integration of forms created in the Microsoft Office InfoPath® 2003 information-gathering program so that firm associates can report

the coming week’s workload to their superiors. Blank Rome plans to begin work on new templates for its extranet sites toward the end of 2006.

#### **Benefits**

With its intranet and extranet portals and unified communications framework, Blank Rome is able to be more efficient internally and provide faster, more valuable service to its clients. “Adopting Office SharePoint Server and a unified communications solution has helped differentiate us,” says Liss. “We’re among the leaders in the legal industry in the use of those tools, and using them to make extranet sites available to our clients has definitely proven to be a competitive advantage.”

#### **Better Internal Collaboration**

With the Office SharePoint Server solution and communications tools such as instant messaging, Blank Rome attorneys are able to work together in a more cohesive way. Coordinating with co-counsel used to be a headache for everyone involved, but today, attorneys have integrated team workspaces for calendars, documents, and anything else pertaining to a particular matter. “Rather than sending e-mail messages back and forth or playing ‘phone tag,’ our attorneys have a collaborative workspace for writing and reviewing documents, keeping a running list of issues, and updating client information,” says Sampieri. “We’ve received a lot of positive feedback from our attorney user community because the tools are helping them work smarter.”

In the past, establishing a common workflow was difficult because attorneys have differing styles and methods for getting things accomplished. Says Sampieri, “The built-in capabilities in Office SharePoint Server 2007 help our attorneys track project tasks, send reminder messages, and enjoy just the right level of project management assistance.”

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#### **Higher Quality of Work and Lower Risk**

With the Office SharePoint Server solution providing reliable access to current documents and information, attorneys can be more confident that they have complete information about a case. “They no longer have to check every possible location or worry that they’re duplicating effort,” says Sampieri. “If a relevant document exists within any of our systems, it will be found by the single search; the interoperability between the SharePoint Server solution and third-party Web parts removes the need for attorneys to know a document’s author, case number, or other identifier.”

Blank Rome also has reduced the security risk associated with attaching sensitive case-related materials to e-mail messages. “Our clients are confident in the solution’s security,” says Sampieri. “We ensure that information on the extranet goes only to those who need it, and we protect internal users from potential conflicts of interest.”

#### **Increased Work Force Efficiency**

The ability to support a streamlined workflow and better matter management helps Blank Rome help its attorneys work more efficiently. “Both our extranet and intranet sites are working tools that have become part of our daily practice,” says Al Krachman, a Senior Partner for Blank Rome. “If it’s one thing our attorneys need, it’s to simplify life, especially with regard to wading through all the information out there. Having an accessible place for everyone to search saves us time and frustration. We no longer have to organize elaborate e-mail folder systems to try to keep track of information, nor do we waste time hunting down missing documents. As a result, we can provide greater value to our clients.”

Additionally, the standardized user interfaces and straightforward tools reduce learning curves and make technology adoption easier for attorneys and staff. “Our portal solution is

especially helpful for new employees,” says Sampieri. “Knowing exactly where to look for a specific piece of data lets our attorneys search smarter and more efficiently, which saves them time.”

That timesavings extends to Blank Rome staff, who can accomplish their tasks more quickly as a result of the solution. For instance, using Office SharePoint Server 2007 made setting up the test announcement application far faster than it would have been in the past. “It took only 25 hours to develop and build the sites using SharePoint Server 2007 because it’s so flexible and customizable; just development alone on the previous system would have taken twice as long,” says Sampieri. “We don’t have a huge development staff, so the ease of use and speed of SharePoint Server 2007 are critical factors for us.”

For the firm’s IT group, increased efficiency enables them to be more responsive to internal users, which increases their interest in expanding the solution to solve other business problems. “For us, the rapid response that SharePoint Server 2007 helps us provide leads to repeat requests and higher adoption, which ultimately results in increased attorney and client satisfaction,” says Liss. “Plus, IT staff are getting more done within the same amount of time, which saves the firm resources in terms of development time and staff utilization.”

#### **Timelier Access and Service for Greater Client Satisfaction**

Because Blank Rome clients can use the portal solution to gain access to attorneys and matter information, they also save time and avoid aggravation. Extranet access is particularly valuable for clients who are in a different time zone or geographic location than their attorneys because they don’t have to get the attorney on the phone or wait

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for an e-mail response for the information they seek.

“When we have a document-intensive, multiparty matter, the Office SharePoint Server solution gives us streamlined communication beyond the regular e-mail setup,” says Krachman. “It’s becoming our standard procedure in these cases to establish an extranet site, and our clients really appreciate it as a more effective, efficient means of communicating with us.”

Clients can go to integrated workspaces whenever they want to and be confident that the information they see is the most up-to-date version; the same goes for others who need access to case-related matters. Says Liss, “Extranet sites also work well for those frequent occasions in which our attorneys work as co-counsel on a case with attorneys from outside the firm. The self-serve access to timely information makes the collaboration smoother. Senior management is pleased that we can deliver something that enhances the client experience without costing a lot of time and money.”

Krachman uses the Blank Rome extranet for reviewing government contract proposals, managing complex litigation, and overseeing business development. “Many of us use the calendaring function on the extranet sites to make sure that all those involved in a case know what’s happening when, and we post correspondence, pleadings, court files, archived reports, and multiple versions of draft agreements,” says Krachman. “Staying current with the Microsoft technologies that facilitate both internal and external communications helps us remain at the forefront of client service in the legal industry.”

#### **A Solution for Expansion**

Blank Rome plans to use the Office SharePoint Server 2007 solution to continue to solve business needs as they arise. Says

Liss, “The level of productivity that we’re able to achieve with SharePoint Server and unified communications was exactly what I was hoping for. We see SharePoint Server 2007 as the culmination of the vision that began with SharePoint Portal Server 2001 in that it truly serves as a development structure for us. The advancements in the development language and capabilities tied with the Web services and the improvements of the Microsoft .NET Framework make SharePoint Server 2007 a real firm-wide solution for solving our business needs.”

## For More Information

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For more information about Blank Rome products and services, call (215) 569-5500, or visit the Web site at: [www.blankrome.com](http://www.blankrome.com)

## Microsoft Office System

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### Software and Services

- Microsoft Office
  - Microsoft Office Professional Edition 2003
  - Microsoft Office Communicator 2005
  - Microsoft Office InfoPath 2003
  - Microsoft Office Live Communications Server 2005
  - Microsoft Office Outlook 2003
  - Microsoft Office SharePoint Server 2007

- Technologies
  - Microsoft Windows SharePoint Services

### Hardware

- HP ProLiant DL 380 server computers
- IBM/Lenovo ThinkPad T42 and X60 portable computers
- Dell OptiPlex GX280 desktop computers