

# International Law Firm Builds EIM Strategy on OpenText

Gowling WLG streamlines secure and collaborative document management via OpenText™ eDOCS DM

Shifting legal content requirements summon a deliberate response. For nearly two decades, Gowling WLG has relied on OpenText technology and integration to build its enterprise information management strategy.

Today's law firms serve clients in an increasingly dispersed, yet connected world. To remain competitive, firms of all sizes must prioritize secure, productive, and collaborative interaction. With more than a century of practice, Gowling WLG establishes operations and integrates technology with clients in mind. The international firm, founded in 1887, offers a full range of legal services, with more than 700 legal professionals located in 10 offices across Canada and the world.

## Inefficiencies and Mounting Pressures

In the case of document management, Gowling WLG needed to address inefficiencies. Jason Mervyn, Director of Technology Business Solutions at Gowling WLG, oversees enterprise applications. He recalls the frustrations of paper when he joined the firm in 1995, just before Gowling WLG (formerly Gowlings Lafleur Henderson LLP) installed a document management solution. "It was much more difficult to share and find versions of documents," he explains. "It was also difficult to track the current version and to maintain a thread of what was happening with a document and who was touching the file."

In the late 1990s, Gowling WLG implemented its first electronic document management system based on OpenText technology. Over the years, the law firm has migrated to the multi-tiered architecture of OpenText Document Management, eDOCS Edition (eDOCS DM) to take advantage of the comprehensive set of standard functionalities. "I'm sure we were solving some immediate needs all those years ago, but many other things have been much simpler for us because we've adopted eDOCS as our EIM platform," says Mervyn.

## INDUSTRY

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Legal

## CUSTOMER

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Gowling WLG

## CHALLENGES

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- Exacting compliance requirements
- Productivity pressures
- Dispersed groups, needed cooperation

## SOLUTION

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- OpenText™ Document Management, eDOCS Edition (eDOCS DM)

## BENEFITS

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- Protected repository for easy retrieval, audit response
- Efficient document control and collaboration



***“Without eDOCS DM, we would struggle to deliver the efficient, top-level service our customers expect.”***

JASON MERVYN, DIRECTOR, TECHNOLOGY BUSINESS SOLUTIONS, GOWLING WLG

In 2001, the law firm merged with a large firm that did not use a document management system. “They lived in the old files and folder world,” Mervyn notes. Combining files proved a time and labor-intensive process—often without user support. “There were some lawyers who could not be convinced that adopting a digital document management platform was the right thing to do.”

In fact, document management is an integral component of an overall Enterprise Information Management (EIM) strategy, according to Mervyn, noting industry trends that call for such a foundation. “Law firms are adopting more collaborative work processes with their clients to meet demand. Pressures to be more efficient and productive are changing how lawyers get work done,” he says.

### **Secure, Centralized Document Management**

Every lawyer and legal assistant at the law firm uses eDOCS DM every day. Despite mergers and company growth, the firm achieved 100 percent adoption for deployed locations, even among early cynics. In fact, one lawyer later visited Mervyn with an update. “He said, ‘I’m here to admit I was completely wrong,’” Mervyn remembers. “After the first couple of years, he said he didn’t know how he would operate without the eDOCS platform for finding and managing documents.”

Gowling WLG houses tens of millions of documents in the eDOCS repository. All files are easy to access and share via intuitive interfaces for the web, desktop, and mobile device in a secure, integrated environment.

Security is virtually effortless, according to Mervyn. A flexible model within eDOCS DM offers up to nine levels of permissions to control document access. “Users simply save documents with appropriate metadata and the security system automatically takes care of it,” he says, also referencing an extension his team developed with Intapp™, a legal solutions provider.

Finding documents is a simple search and retrieve with advanced technology, including full-text, search term highlighting, result clustering, and more. Users easily locate, then share information with clients via cloud-based workspaces.

### **Strategic EIM—Past, Present, Future**

Gowling WLG credits early investment in document management technology as a strong EIM foundation to build upon. “There are key requirements that have changed over the years that eDOCS DM allowed us to change with,” Mervyn says. For instance, adoption supports compliance with audit-related requests from clients and regulators. “If we didn’t have eDOCS, it would be very difficult for us to monitor our compliance with internal and external policies.”

### **Open APIs, Valued Partnership**

Unique within the legal industry, Mervyn manages a team of several on-staff programmers who focus on strategic client-facing efforts. Using open APIs (application programming interfaces) from OpenText, the law firm is extending eDOCS DM into new areas with new efficiencies.

For example, the firm recently digitized the ingestion of documents from partners around the country in a specific area of law. Files that used to arrive in several boxes are now transferred via a private cloud. “We’re setting security, adding metadata, and alerting lawyers and staff all through an automated process that is built heavily on eDOCS APIs,” Mervyn says.

For the size of its infrastructure and repository, Gowling WLG maintains a lean document management support team on-site. “Rather than bulk up eDOCS staff, our internal team leverages our OpenText partnership,” Mervyn says. “OpenText Premier Support is an important part of our extended team.”

### **Strong EIM for Client Service**

Protected, efficient and team-driven – all are desired document management traits. On their own, such results support compliance and efficiency, but they are most valued by Gowling WLG for supporting client care. “That’s what we do in service industries,” Mervyn explains. “It all comes down to providing good customer service: without eDOCS DM, we would struggle to deliver the efficient, top-level service our customers expect.”

Lawyers and legal assistants spend less time organizing documents and tracking multiple versions. Instead, they search and retrieve with ease, with greater focus on working the cases. Clients have noticed. One even called, not for legal advice, but for help finding a document. “The client said, ‘We know we have the file somewhere, but Gowling WLG has that system that lets you find things so quickly,’” Mervyn relates. “Our legal assistant found the four-year-old document and sent it to the customer—while they were still on the phone.”

Overall, records management and information governance capabilities within eDOCS DM mitigate risk and streamline compliance. However, in the daily flow of documents in and documents out, security can be summed in a simple assurance: “People who should have access to the document have it, while those who shouldn’t have that access don’t even know the document exists,” Mervyn says.

Leveraging OpenText accessibility, Mervyn expects to push the envelope with add-ons and custom development. “We’re able to create efficiencies that will differentiate us from other law firms,” he notes. “Gowling WLG and its clients will be well served by it.”



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