

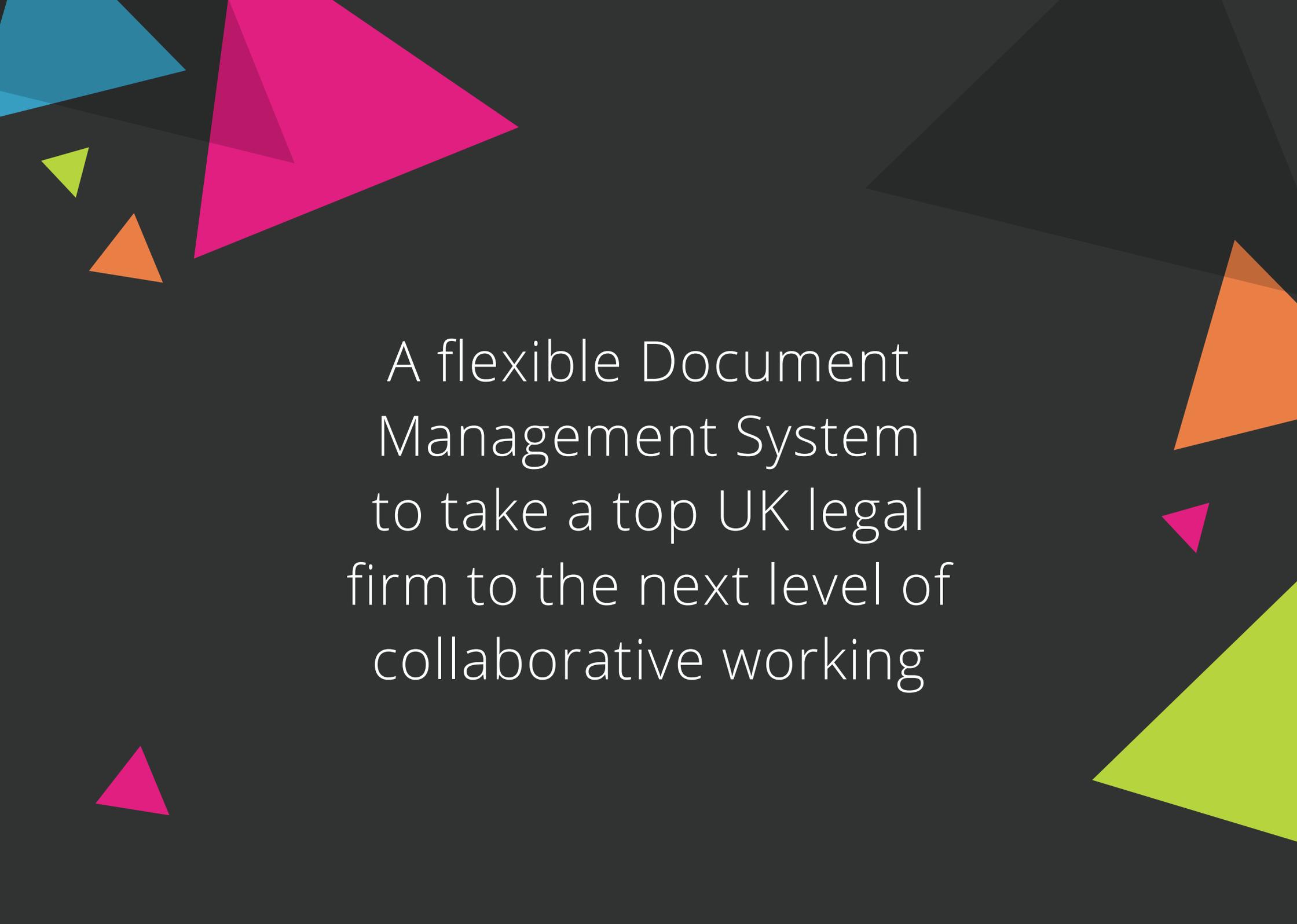


# SHOOSMITHS

Document Management System

Developed by  
ClearPeople 





A flexible Document  
Management System  
to take a top UK legal  
firm to the next level of  
collaborative working

# 1

## An introduction to the project

Shoosmiths is a major UK law firm with 10 offices across the UK. Their clients come from a diverse and exciting range of organisations - from large international corporates to smaller, ambitious, high growth businesses - whether private, public or UK plc.

With 139 partners and more than 800 lawyers and legal advisers, the law firm were using a Document Management System which was no longer fit for purpose – it was taking lots of time for employees to store, locate, share and collaborate on documents which was impacting on the businesses productivity.

SHOOSMITHS  
+  
ClearPeople

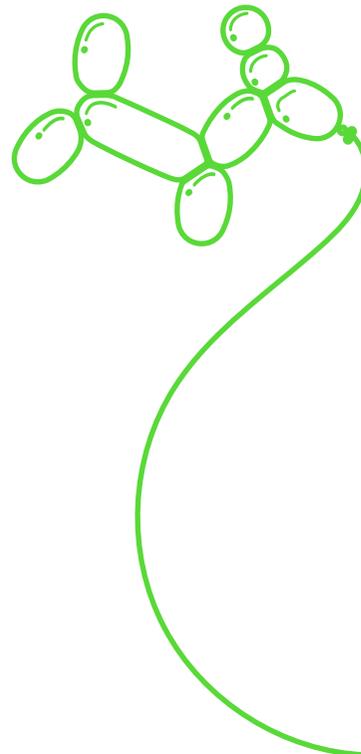


## 2

### Key requirements

Shoosmiths had previously deployed the Hummingbird Enterprise™ DM v6 (DM6) document management system to create, manage and archive Client and Matter related content. The platform had been in place for over 6 years and required a complete overhaul to increase business productivity and efficiencies, and streamline working processes. The platform was only capable of handling document centric content management, with emails and other types of content managed elsewhere in mailboxes, local or shared drives.

Shoosmiths were also keen to future-proof their system to allow for potential technology consolidation and the creation of a digital workplace taking advantage of SharePoint, workflow, enterprise search and a new intranet in their digital roadmap.



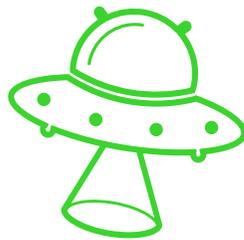
With several millions of documents, in addition to document versions, it was imperative that the platform transition would run smoothly with minimum disruption to the business. As a leading Microsoft UK partner and with over a decade of experience in delivering award-winning Document Management (DM) solutions, ClearPeople was selected to implement a best-of-breed DM solution that delivered tight integration with Microsoft Office including document and email management, to improve internal collaboration and efficiency across all of Shoosmiths' offices.

# 3

## Solution overview

The technology used to implement Shoosmith's new DM system was:

- Microsoft SharePoint 2013
- Metalogix StoragePoint
- MacroView DMF
- ClearPeople's Automatic Provisioning Management features



Microsoft SharePoint was the platform of choice for Shoosmiths' new document management system. This was a leading-edge solution for Shoosmiths such that they had utilised learnings from other industries around document management rather than relying on incumbent providers within the legal niche. SharePoint's Out-Of-The-Box features provide a broad set of document management capabilities that enable the organisation to:

- Store, organise and locate documents
- Ensure the consistency of documents
- Manage metadata for documents
- Help protect documents from unauthorised access or use

The platform also offers the flexibility required to plan for long-term updates.

# 4

## Some cool techie info

Shoosmiths were able to effectively take advantage of SharePoint's support for Remote Blob Storage (RBS) by using Metalogix's StoragePoint, reducing the SQL server database storage capacity requirements significantly, while allowing for a tiered storage management infrastructure.

The solution provides an API and integration for SAP for provisioning of new Clients and Matters implemented with a combination of ClearPeople's Automatic Provisioning Manager and bespoke in-house components.



Because SharePoint works so differently to the incumbent DM6, the information architecture had to be completely redesigned. ClearPeople also defined a logical migration process and built a bespoke process to ensure that content was migrated and validated from one platform to the other.

The development of a tailored provisioning management tool allows content administrators to easily create new areas and deploy sites and libraries for the DM system in a consistently governed way through a simple drop-down menu. It enables new sites to be pre-populated with themes relevant to the specific area they are working in, typically inheriting permissions and metadata tags that are pre-defined.

A basic approval process can be utilised that will allow the administrator to approve the creation of the new site or page. This tool and its accompanying processes has meant that document governance and consistency across the business is no longer an issue, despite the geographical spread of Shoosmiths' offices.

The project also had to dovetail into Shoosmiths Windows XP migration and Office 2013 programme to ensure not only a fully integrated solution was delivered but also an integrated deployment programme with no room for error as the legacy solution was not compatible with the new desktop environment. It required ClearPeople and Shoosmiths' team working in close co-operation.

# 5

## Benefits and results

In order to measure the success of the project it was important to establish clear KPIs from the start. Key objectives were to drive efficiency; encourage collaboration; retrieve and store documents more easily; provide consistency across offices; and standardise the way information is held and disseminated. Through analytics, employee surveys and focus groups, it was possible to identify if success factors had been met and more importantly to adapt the solution for future improvements.

The new system had a soft launch in the summer of 2014, with Shoosmiths' IT team running a pilot for 6 months. Following this successful pilot, the first rollout of the system to a matter-based team went live in early 2015 and so far the implementation of the new Document Management System built on SharePoint has fulfilled Shoosmiths' key objectives of driving

efficiency within the team and allowing for more efficient collaboration across all of their offices. The solution has not only made the retrieval and storage of documents and emails intuitive and easy to administer meaning the time to find documents has been dramatically reduced, but it has also provided more consistency for the teams, standardising the way information is held and shared.



Client Name	Client ID	Workspace Open to All?	Workspace Owners	Workspace Members	Workspace Status	Matter ID	Matter Name
ShoClient1	ShoClient1ID	Yes			Open	ShoMatter1ID	ShoMatter1
ShoClient1	ShoClient1ID	No	spuser1	spuser2	Open		

Client site created.

# 5

## Benefits and results

ClearPeople's expertise in Document Management and effective migration plan enabled the transition period from DM6 to SharePoint to be as smooth as possible, allowing Shoosmiths to adopt a Business as Usual approach. The utilisation of their bespoke provisioning management tools has provided a better approach for Matter inception, giving individual users the capability to quickly set up new matter and non-matter sites very easily allowing for consistent filing and collaboration. ClearPeople provided a more modern and maintainable information architecture. ClearPeople adapted the MacroView DMF (Document Management Framework) solution to match and improve on the previous functionality of the incumbent Document Management platform so that users were able to achieve the same user experience they were used to having without the need for formal training. One of Shoosmiths senior partners commented "Two days in and the transformation is nothing short of amazing! I am so impressed with the

new systems. The response times are massively improved and the integration of the applications is brilliant. They are so intuitive!"

This inclusion of MacroView DMF as part of the overall solution also delivered tight integration between SharePoint, Word, Excel, PowerPoint, Adobe (PDF), the desktop and Outlook for efficient email management, through a simple but powerful and consistent interface.

It is also worthwhile noting that Shoosmiths now operate a platform capable of dealing with any Client/Matter content types rather than just documents. In effect the platform is now ready to deliver Client/Matter workspaces, collaboration areas and much more. It also facilitates the next step in Shoosmiths' digital strategy which integrates SharePoint workflows and document management into a client portal which will enhance client collaboration and optimise working practices.

The screenshot shows a web form for creating a new matter item. The form has the following fields and values:

- Title: ShoosmithsSite2
- Workspace Type: Matter
- Workspace Template: Empty Matter Site
- Client Name: ShoClient1
- Client ID: ShoClient1ID
- Matter Name: ShoMatter1
- Matter ID: ShoMatter1ID
- Workspace Open to All?:
- Workspace Owners: Enter names or email addresses...
- Workspace Members: Enter names or email addresses...
- Workspace Status: Open
- Description: (empty text area)
- Log: (empty text area)

At the bottom right of the form are two buttons: "Save" and "Cancel".

The form when we add a new matter item. A new site will be created below the client site.

# 5

## Benefits and results

“Two days in and the transformation is nothing short of amazing! I am so impressed with the new systems. The response times are massively improved and the integration of the applications is brilliant. They are so intuitive!”

Shoosmiths senior partner

# 6

## Award-winning

The project recently triumphed at the Metalogix Best of Breed Awards this year, taking home the top prize for Agent of Change 2015 at a glitzy event during Microsoft Ignite in Chicago.

The award recognised the contribution of Shane Scott, IS Director at Shoosmiths for bringing forth a game changing technology solution to the business using SharePoint.

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“Throughout the project, the Shoosmiths and ClearPeople teams worked as one to develop and deploy an innovative solution which is a key element of Shoosmiths’ digital strategy, improving both internal efficiency and creating a platform for improving collaboration with and enhancing the services we provide to our clients.”

Shane Scott, IS Director, Shoosmiths

