



Microsoft Office System Customer Solution

Case study

Dynamic Law Firm Increases Productivity, Maintains Competitive Edge

“From drafting briefs and letters to costing, research, and processing phone calls, we are anticipating a boost in productivity of up to 20 percent by running OMS Framework on an Office 2003 foundation.”

Mike Franklin

*Cofounder and Managing Partner
Franklins Solicitors LLP*



Based in Central England, Franklins Solicitors LLP provides counsel in civil and criminal litigation and corporate commercial and property services. The firm employs 130, including 55 lawyers of whom 10 are partners. Operating out of two offices, one in Northampton and another in Milton Keynes, the firm generated 2002 revenues of £5 million.

In recent years Franklins has come to rely on an award-winning case and office management system developed by Microsoft Certified Solution Provider FWBS Ltd. Now, by using the system in conjunction with Microsoft Office Professional Edition 2003, the firm will take advantage of Research Panes, Smart Documents, and Smart Tags to dramatically boost productivity and increase accuracy and timeliness. As a result, the firm will control or reduce indemnity-insurance premiums, make more efficient use of IT resources, increase client satisfaction, and position itself securely for growth.

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
Based in Central England, Franklins Solicitors LLP employs 55 lawyers among its 130 employees and earned 2002 revenues of about £5 million serving businesses and individuals involved in civil and criminal litigation.	Franklins needed to update its case management system with more automated methods of producing documents and expediting work processes, more immediate and dynamic access to information, and more granular recording of events, activities, and time..	Franklins is deploying Microsoft® Office 2003 to take advantage of productivity enhancements such as research pane, smart document, and smart tag technologies for boosting the functionality of its OMS Framework case management system.	<ul style="list-style-type: none"> Productivity increase of up to 20 percent Enhanced work product accuracy and timeliness Smarter decision making, minimized indemnity-insurance premium costs, more efficient use of IT resources Selected deployment tasks completed in 10 minutes instead of a half day



“With the Smart Document deployment capabilities of Office 2003, we managed to complete many deployment tasks that used to take a half day in just 10 minutes. With this kind of efficiency, the firm’s IT staff will be able to concentrate on projects that are ultimately more lucrative, such as revamping workflow design.”

Mike Walker

*Development Director
FWBS Ltd.*

Situation

Known as the OMS [Office Management System] Framework, the case and office management system in use at Franklins Solicitors LLP long provided a global structure and processes for document production and information retrieval. But with a pressing need for lawyers, paralegals, and other staff to have immediate and timely access to more than 60 gigabytes of internal information and an even greater volume of external information—a high level of user intervention was required for users to take full advantage of the system’s powerful capabilities.

For example, the firm has a vast knowledge base and library of precedent templates. But because of the scope and volume of these resources, users are not always aware of the content that is available to them. As a result, they might often spend time and incur costs rekeying existing text or re-creating existing material.

Solution

For these reasons and to maintain the firm’s competitive standing by continuing to offer superior client service, Cofounder and Managing Partner Michael Franklin and his colleagues decided to enhance the automation and information-access capabilities of the OMS Framework by migrating it to an environment based on Microsoft® Office Professional Edition 2003 and taking advantage of the abundant productivity-enhancement tools available in that product.

In this migration, Franklins Solicitors is using Microsoft Visual Studio® .NET 2003 and the Microsoft .NET Framework to integrate the core functionality of OMS Framework with Office Professional 2003. The enhanced OMS Framework and Office Professional 2003 will run on all the firm’s 130 desktop PCs, a handful of laptops, and

several Tablet PCs running Microsoft Windows XP Tablet PC Edition.

Franklin explains the primary and ultimate goals of the migration: “With the deployment of OMS Framework on Office Professional 2003, we’ll increase user productivity, enhance work-product accuracy so as to control or reduce indemnity-insurance premium costs, and make better use of our IT resources. As a result, we’ll boost client satisfaction and accommodate business growth.”

Benefits

Streamlined Information Access

As FWBS Development Director Mike Walker explains, the migration will enable Franklins to exploit the integrated search functionality of Research Pane and Smart Document technologies for one-click access to billable tasks, templates, and reusable text from within the task pane.

For example, when a lawyer is working on a brief, he or she can use the Research Pane from within Office Word 2003 to pull in all relevant prior rulings and other historical and client information. To fill out the myriad court-required forms for litigation, the lawyer can use Smart Documents to automatically enter reusable text and data. When it’s time for billing, that same lawyer can retrieve a highly granular record of hours worked on any given case without having to leave the comforts of the Office 2003 environment.

Much of this functionality, Walker points out, comes courtesy of the powerful XML capabilities and easy accessibility of the Research Pane within Microsoft Office 2003.

“By implementing Smart Document base templates with XML, we’ll be able to make virtually all tasks easier by incorporating a level of intelligence into standard documents and presenting links in the Research Pane to applications and data that



are relevant to the subject being researched or document being prepared,” Walker says. “Moreover, Research Pane enhancements will streamline access to dynamic and complex documents and information—from traditional online legal references to internal data stores of documentation on office policies, client and case histories, and ISO 9001 standards—and automate the delivery of that information at critical junctures.”

Franklin concurs: “Research panes are crucial in being able to expose functionality above and beyond what we could do in our prior Office XP–based environment.”

Maintaining Efficiency and Focus

What all this means is that the firm’s lawyers, paralegals, research assistants, and other staff can work faster and smarter no matter what task they are undertaking. “From drafting briefs and letters to costing, research, and processing phone calls, we are anticipating a boost in productivity of up to 20 percent by running OMS Framework on an Office 2003 foundation,” Franklin says, adding that productivity

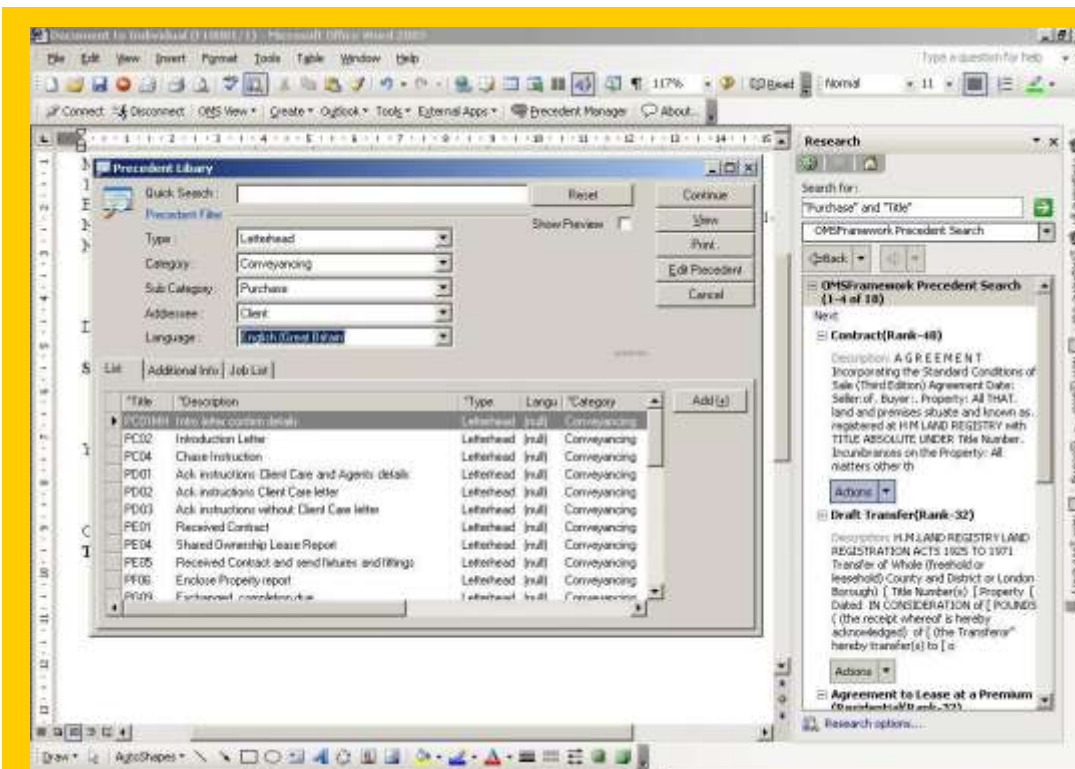
advantages can be realized even before the firm starts working on a case.

“For example, consider the simple truth that certain types of cases may be more or less lucrative for the firm, or that new legislation could make certain types of cases more or less costly for the firm to pursue,” Franklin says. “A lawyer would know this early in the process of pursuing a given case because, when he or she referred to the case type in initial correspondence with a prospective client, the system would flag the reference with links to relevant documents and information. This would enable the lawyer to decide right away—rather than after the process has begun—whether to accept a given case, saving time and money and preserving client goodwill.”

For the cases that Franklins lawyers do take on, having instant access to vital information also helps to minimize the risks that can lead to client complaints and, on some occasions, litigation. “The cost of indemnity insurance is significant, and anything that can help to improve staff awareness, increase the accuracy of our

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Franklins Solicitors LLP



Office 2003 Research Panes make timely information available to Franklins lawyers, paralegals, and research assistants at every point in the life cycle of a case.



Software and Services

Microsoft Windows XP Professional
Microsoft Windows 2000 Server
Microsoft Exchange 2000 Server
Microsoft Windows 2003 Server
Microsoft SQL Server 2000
Microsoft Visual Studio .NET 2003
Microsoft .NET Framework 1.1
Microsoft Office System:

- Microsoft Office Professional Edition 2003
- Microsoft Office InfoPath™ 2003

FWBS OMS Framework Legal Edition

Hardware

Compaq ProLiant ML580
Compaq ProLiant DL380 G3
Compaq DeskPro

Partner

FWBS Ltd

work, and establish standard procedures can help us to keep that cost down,” Franklin says. “Just one claim avoided in a year, for example, could save us more than £15,000 in excess premium payments.”

Walker emphasizes that Franklins users will become more efficient not only at consuming information but also at producing it. “That’s because the Office 2003–based enhanced OMS Framework solution will record key data involved in correspondence, including e-mails and other legal documents, automatically and in a highly granular fashion,” he says. “Moreover, the automated time recording provided by the system will help us to maintain accurate unit and activity information for a wide assortment of specific tasks.”

Making the Most of Limited Technology Resources

At Franklins, working faster and smarter applies not only to the lawyers and their staff but also to the two individuals who are responsible for IT training and system maintenance. For example, Smart Document deployment capabilities, such as automated installation through the .NET Framework and Web servers, are expected to reduce IT costs in delivering future solutions. This will free up IT resources from the task of manual installations when it is time for future updates, according to

Walker, who works closely with the firm’s internal IT staff.

“With the Smart Document deployment capabilities of Office 2003, we managed to complete many deployment tasks that used to take a half day in just 10 minutes,” Walker points out. “With this kind of efficiency, the firm’s IT staff will be able to concentrate on projects that are ultimately more lucrative, such as revamping workflow design and improving productivity for the firm.”

Franklin points to a corollary and long-lasting benefit. “When people are able to get their work done more easily—and this goes for IT professionals, lawyers, or anyone else—they tend to be more satisfied in their jobs. We already enjoy one of the highest retention rates in the legal profession, and we credit much of this to the automation capabilities our staff members have enjoyed for many years with OMS Framework. By making this solution even more powerful through the deployment with Microsoft Office 2003, we’ll be able to maintain our enviable retention rate for an ultimately higher level of client satisfaction and a stronger foundation for supporting the growth of our business.”



Microsoft Office is the business world's chosen environment for information work that provides the software, servers, and services that help you succeed by transforming information into impact.

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For more information about Franklins Solicitors, visit the Web site at:
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Based in Northamptonshire, England, FWBS Ltd. is an independent developer of software products for lawyers and other professional firms worldwide. Founded in 1997, the company has installed its OMS Framework case and management system in more than 160 businesses. For more information about FWBS Ltd., visit the Web site at: <http://www.fwbs.net/>

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