

Microsoft Office System Customer Solution Case Study



Law Firm Enhances Client Service, Boosts Productivity, and Reduces IT Costs

Overview

Country or Region: United States

Industry: Legal services

Customer Profile

Jackson Lewis is one of the largest law firms in the United States dedicated exclusively to representing management on workplace issues. With 600 lawyers and 550 other professionals, the firm serves clients from 42 offices.

Business Situation

Jackson Lewis sought to stay current with technology to better collaborate with clients and help attorneys and other professionals work more productively.

Solution

Jackson Lewis upgraded all employees to Microsoft® Office Professional Plus 2007 in a six-month process that included transfer of customizations, training, and postdeployment support.

Benefits

- Enhanced collaboration and document integrity
- IT savings in licensing and storage
- Greater productivity for all staff
- Foundation for further business optimization

“With a powerful foundation like the 2007 Office system, there’s almost no end to the solutions we can build to help our attorneys and staff provide clients with the outstanding service they deserve.”

Chris DeMontravel, Director, Management Information Systems, Jackson Lewis

As legal counsel for some of the largest and most prestigious corporations in the United States, along with smaller companies and nonprofit groups, Jackson Lewis takes pride in helping businesses avoid or mitigate workplace disputes. When clients began moving from earlier versions of Microsoft® Office software to the 2007 Microsoft Office system, the firm decided to make the same move to avoid compatibility problems and improve employee productivity. Through a process that included remote training and postdeployment support, the firm upgraded its desktop software, deploying Microsoft Office Professional Plus 2007 to all 1,150 employees. After what one leader called an “easy adoption process,” Jackson Lewis enhanced collaboration with clients, demonstrated technology leadership, boosted productivity among attorneys and other staff, and reduced IT costs by more than U.S.\$50,000 annually.



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Brett Christensen, Assistant Director,
Management Information Systems,
Jackson Lewis

Situation

Since 1958, Jackson Lewis, specializing in workplace law, has represented a wide range of public and private businesses and nonprofit institutions in a vast array of industries. With 600 lawyers in 42 offices nationwide, Jackson Lewis combines a national perspective with an awareness of local business environments.

Jackson Lewis attorneys and staff work hard to ensure they are providing excellent service to their clients. Part of that service involves preparing and delivering documents, most of which are produced using Microsoft® Office programs, in a way that is most convenient for clients and the courts.

When the firm’s clients began moving from earlier versions of Microsoft Office software to the 2007 Microsoft Office system, Jackson Lewis recognized that it could best serve its clients by making the same move. According to Chris DeMontravel, Director of Management Information Systems (MIS) at Jackson Lewis, the firm’s primary motivators were the need to avoid file-format compatibility problems and to enhance efficiency. “In a highly cost-conscious environment, we wanted to do all we could to ensure that our attorneys and other professionals were using their billable hours most efficiently,” DeMontravel says.

DeMontravel and her colleagues evaluated the Microsoft Office 2007 suites and were impressed with the Office Fluent™ user interface—in particular, the Ribbon that replaces multiple menus and toolbars with a single location for all the commands that users need. “With the Ribbon, we saw a considerable potential for helping the firm’s professionals work more productively,” DeMontravel explains.

Other attributes of the suites that were attractive to DeMontravel and her colleagues included the expanded row and column limits of the Microsoft Office Excel® 2007 spreadsheet software, which Steve Laska, Director of Finance and Strategic Planning at Jackson Lewis, considered useful for budgeting and strategic planning. For performance and reliability, Laska and other financial professionals liked that the 2007 Office suites offload more processing to the server than did the Microsoft Office 2003 Editions.

Solution

Jackson Lewis began its upgrade to Microsoft Office Professional Plus 2007 at one office, where, according to Taisha McCauliff, MIS Trainer at the firm, the software was very well received. As part of the initial upgrade, McCauliff and other members of the deployment team accessed online training tools to prepare themselves for upgrading employees at the other offices.

For those employees, McCauliff planned to provide employee training in a conference room while other team members, primarily help-desk staff, installed the software on employees’ PCs. Once employees returned to their desks, those same help-desk staff members would provide direct support.

Deployment and Training

After performing this procedure in three offices, however, McCauliff and her colleagues concluded that the in-person approach to training and postdeployment support was unnecessary. “Employees picked up the concepts and user interface of the 2007 Office system so easily that we were able to provide the training and support for the remaining offices remotely,” McCauliff says.

“Office Excel 2007 delegates far more processing work to the server than did Excel 2003, and, as a result, performance overall is better and lockups that we used to encounter routinely are a thing of the past.”

Steve Laska, Director of Finance and Strategic Planning, Jackson Lewis

To do this, McCauliff prepared a Microsoft Office Live Meeting 2007 presentation that covered initial training and the most common support issues, and made it available to the remaining Jackson Lewis offices. Employees who could take time away from their desks viewed the presentation in a conference room while the help-desk staff performed installations, and other employees viewed the presentation on their PCs.

To ensure that all Jackson Lewis employees received a standard setup plus customizations, the deployment team installed a custom Windows® installer transform file with the Office Professional Plus 2007 image. Software and training were delivered to every one of the firm’s 600 attorneys and 550 other staff members over a period of about six months.

After deployment, McCauliff made the initial training presentation available to new employees and an advanced presentation available to both new and existing employees seeking to advance their skills on the 2007 Office system. The initial presentation focuses on the Get Started tab, an add-in of video demos, interactive guides, and online training courses that demonstrate how the Office 2007 programs work and where to find the commands that employees used in the Office 2003 Editions.

The advanced presentation focuses on the Track Changes, Document Inspector, Mail Merge, Styles, and Table of Contents features of Microsoft Office Word 2007; basic through intermediate features of Office Excel 2007; and basic through advanced features of the Office PowerPoint® 2007 presentation graphics program.

Because the upgrades occurred over a period of six months, Jackson Lewis

deployed Office Professional Plus 2007 to its virtualization server so that employees could familiarize themselves with the new software before receiving training and upgrades on their own PCs. The firm also deployed the Microsoft Office Compatibility Pack for Word, Excel, and PowerPoint 2007 File Formats to help avoid compatibility problems with clients that had not yet moved to the 2007 Office system.

Transferring Customizations

The firm took careful steps to transfer customizations, including up to 20 Microsoft Office Word templates containing more than 275 macros, 50 autotext entries, and custom numbering. According to Brett Christensen, MIS Assistant Director at Jackson Lewis, the templates themselves transferred smoothly, but some tweaking was needed to retain access to them through the menu bar, instead of the Add-Ins tab. The deployment team solved this problem by customizing the Ribbon and rewriting 20 of the macros. “This took just over a week, which was far easier than we expected thanks to the XML integration,” Christensen says.

To transfer autotext entries, the deployment team made a copy of the Normal.dot template, renamed it Autotext.dot, and placed it in the Document Building Blocks folder. The team then used Building Blocks Organizer to complete the transfer. To transfer the custom numbering system, the deployment team re-created the system and put it into a template that was installed as part of the deployment.

Benefits

By upgrading to the latest desktop productivity suite, Jackson Lewis attorneys, accountants, and other professionals can

offer clients better service through stronger collaboration and document integrity. The firm can save IT costs by retiring at least one third-party product whose functionality is available in the Microsoft Office 2007 suite, and IT executives anticipate further savings from being able to slow the growth of storage servers. Attorneys and other professionals are working more efficiently, producing handbooks, pleadings, briefs, financial reports, and other documents more rapidly than before. With the 2007 Office system, the firm also has a foundation on which it can build additional productivity enhancements, such as a more powerful intranet and streamlined workflows.

Stronger Collaboration and Document Integrity

With the upgrade to Microsoft Office Professional Plus 2007, Jackson Lewis is doing what it set out to do from the beginning: staying current with clients that moved to the product and demonstrating technology leadership to all clients, existing and prospective. "For better collaboration, longtime clients already on the 2007 Office system like that Jackson Lewis is using the same technologies that they are," DeMontravel explains. "New clients appreciate that we are forward-thinking on IT matters."

Jackson Lewis has improved document integrity, as well. "Creating and publishing documents with multiple authors and reviewers is a common practice in the legal environment, and we can find and remove hidden data that becomes part of the document through the review process easier and faster thanks to the Document Inspector metadata-cleaning tool," DeMontravel says. "A side benefit is that by having this capability in the 2007 Office system, we can retire a third-party product

that we licensed and supported in the past, for a yearly savings of \$50,000."

The firm plans to integrate the Document Inspector functionality into Office Outlook 2007 so that documents are free of hidden data not just when they are ready for publication but whenever they are distributed over e-mail.

Another advantage for Jackson Lewis is the smaller file size of documents produced in the 2007 Office system, thanks to its support for Open XML Formats. "Smaller files not only are easier to send over any kind of connection—and this is significant when attorneys are traveling or working where Internet access may not be optimal—but also are less likely to become corrupted," DeMontravel says. "This helps us maintain the high level of document integrity that is so essential in the legal environment."

Long-Term IT Savings

Use of Open XML Formats is expected to help Jackson Lewis reduce IT costs in terms of its storage infrastructure, which today holds up to 8 terabytes of data.

"Considering the rapid expansion in the use of PDF [Portable Document Format] and other large file types, storage requirements in our industry are growing dramatically," Christensen says. "With XML to help us reduce the size of some file types, particularly those of Office Word and Excel, we are better positioned to slow the growth of storage requirements. This means fewer new servers over the long term to purchase, run, and maintain."

Higher Productivity

With the upgrade, Jackson Lewis is boosting productivity among all its professionals. "It is hard to measure, but we believe that employees started working

“This [Microsoft Office SharePoint Server 2007] deployment will help us leverage document information channels to capture metadata more comprehensively and simplify document location.”

Leonard Ciffone, Manager of Applications Development, Jackson Lewis

more efficiently right away, thanks to the intuitiveness of the Ribbon,” McCauliff says. “Several longtime Office users at the firm have told me they found the 2007 Office system much easier to learn and use than earlier versions of the software.”

In particular, McCauliff adds, attorneys and staff are finding it easier to produce handbooks, pleadings, and briefs. “Many things that we create in Office Word 2007 can be completed more rapidly than before,” she says. “This means delivery to clients that much sooner and a more effective use of billable time.”

In addition to attorneys and paralegals, Jackson Lewis accounting professionals are enjoying significant productivity improvement. Much of this improvement, according to Laska, can be attributed to the way that Office Excel 2007 offloads online analytical processing (OLAP) to the server that holds the firm’s Microsoft SQL Server® 2005 data management software. “Office Excel 2007 delegates far more processing work to the server than did Excel 2003, and, as a result, performance overall is better and lockups that we used to encounter routinely are a thing of the past,” Laska says. “This helps us complete major financial analyses that much faster.”

Laska says he and his colleagues can conduct budgeting and strategic planning more easily thanks to the greater number of rows and columns supported by Office Excel 2007. “We also work more efficiently overall with the help of the larger and more easily customizable toolbar,” he adds.

Foundation for Business Process Improvement

Encouraged by its successful upgrade of the Microsoft Office suite, Jackson Lewis is moving toward deployment of Microsoft Office SharePoint® Server 2007 to enhance its current intranet based on Office SharePoint Portal Server 2003. “This deployment will help us leverage document information channels to capture metadata more comprehensively and simplify document location,” says Leonard Ciffone, Manager of Applications Development, Jackson Lewis.

According to Ciffone, the firm also will incorporate the Microsoft Office InfoPath® 2007 information-gathering program into the intranet to streamline the new-hire process and reduce paperwork in general. Jackson Lewis anticipates being able to create and deploy electronic forms solutions to gather information efficiently and reliably and extend those solutions beyond the corporate firewall.

Other plans to further leverage the firm’s deployment of the Microsoft Office 2007 suite are being discussed regularly. “With a powerful foundation like the 2007 Office system, there’s almost no end to the solutions that we can build to help our attorneys and staff provide clients with the outstanding service that they deserve,” DeMontravel says.

For More Information

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Microsoft Office System

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