



Law Firm Deploys Robust, Powerful, and Cost-Effective Knowledge-Management Solution

Overview

Country or Region: South Africa

Industry: Law

Customer Profile

Jowell, Glyn & Marais (JGM) is a law firm founded in 1992 and based in Johannesburg, South Africa. It employs 65 people and uses 40 to 60 PCs.

Business Situation

To maintain its leadership position in corporate and tax law, the firm needed a more stable document-control solution. It also needed improved capabilities for research, security, and remote access as well as widely available engineering expertise.

Solution

The firm deployed a highly customized knowledge-management solution based on Microsoft® Office SharePoint® Portal Server 2003 and accessible through a centralized intranet portal.

Benefits

- Minimal change management
- Better stability, functionality
- Powerful remote access
- Superior cost-effectiveness
- Widely available support

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Alwyn Scholtz, Managing Partner, Jowell, Glyn & Marais

To address stability problems in a legacy document-control solution, partners at the South African law firm of Jowell, Glyn & Marais (JGM) implemented a new solution based on Microsoft® Office SharePoint® Portal Server 2003—after evaluating that technology against the leading dedicated document-management systems available at the time in South Africa. With the help of Microsoft Gold Certified Partner Intervate, the firm deployed a highly customized solution that is dramatically more stable than its predecessor. The new solution enables the firm to more easily access current documents and leverage the value of historical documents, establish strong security and remote-access mechanisms, and enhance functionality—all for an initial cost of just one-quarter that of some of the dedicated systems. The firm expects long-term costs to remain low as well, thanks to expertise in Microsoft software that is widely available locally and regionally.

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Graham Lawson, Chief Operating Officer and Director, Intervate

Situation

To maintain its position as a leader in the complex and competitive environment of corporate and tax law, the South African firm of Jowell, Glyn & Marais Inc. (JGM) depends on having a powerful, flexible, and easily accessible document-control solution. Starting in the mid-1990s, the firm relied on a solution based on Microsoft® Access, and into the early 2000s the solution served the firm well. But as the underlying database expanded, stability became a serious problem. System freeze-ups and crashes occurred at least daily, and users could no longer rely on the solution to provide the data and documents they needed.

To mitigate the problem, JGM IT staff tried to limit the size of the database, which meant routinely offloading vast stores of historical data and documents. But this approach created problems of its own by making much of the firm’s historical knowledge base difficult and time-consuming to access.

“In the middle of an important client discussion, a senior partner might recall having worked on a similar case 10 or 12 years earlier,” explains Alwyn Scholtz, Managing Partner at JGM. “But without easy access to the related documents, we couldn’t share the value of that work at the time of the discussion.”

Accessing current documents under the prior solution was another problem, because of the solution’s limited search capabilities. “Users could search under client name or client matter, but not under keywords, and a search using basic Windows search functionality or some other basic search software could take 10 minutes, an hour, or even longer,” Scholtz notes. “You just never knew.”

Security posed another challenge in the prior solution because of difficulty in implementing passwords and authority levels, and remote

access posed another challenge still. Users who were traveling or working from home had to access the database through a dial-up connection and Microsoft Windows Server™ 2003 Terminal Server—an approach that was severely limited because of slow response and the inability to print documents directly from the remote PCs. Windows Server 2003 is part of Microsoft Windows Server System™ integrated server software.

A separate challenge was for users simply trying to collaborate between the firm’s headquarters at Johannesburg and an office in Cape Town. To maintain a reliable direct connection over the 1,500 kilometers separating the two offices, the firm had to maintain a leased line that Scholtz says was not only very costly but also, because of the distance, limited in its functionality.

Solution

To help select the technology for a new solution, as well as implement and support it, JGM enlisted Intervate, a Microsoft Gold Certified Partner also based in Johannesburg. “Having a partner capable of helping us throughout the process was vital because of our limited IT staff—just two people to handle everything from network support to user training,” Scholtz explains.

Scholtz and his colleagues worked closely with Intervate Chief Operating Officer and Director Graham Lawson to evaluate competing technologies, including dedicated document-management systems such as Hummingbird DM, eWorks, and Worldox. Ultimately, however, the team decided to remain with Microsoft software and develop a solution based on Microsoft Office SharePoint® Portal Server 2003.

Lawson explains that the decision was based primarily on three factors: suitability, cost, and availability of support. Suitability was

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perhaps the most obvious differentiator between the competing technologies.

“The dedicated document-management systems were clearly designed for larger and more distributed organizations than JGM, with the complexity and cost that such designs entail,” Lawson says. “At the same time, we saw that SharePoint Portal Server 2003 also could serve organizations of all sizes, and with an out-of-the-box feature set that easily rivals those of the dedicated systems. We also saw that it was designed to be far easier to implement, which makes it more suitable for an organization like JGM, and far less costly to license, deploy, and support.”

For Scholtz, support was a key advantage of a SharePoint-based solution over a dedicated system—not only in terms of cost but also in terms of availability.

“Whatever solution we selected, we were going to do extensive customization, and we knew there was a risk in that. But we also knew that with a SharePoint Portal Server 2003 platform there were 50 to 100 people locally and regionally, at Intervate and elsewhere, who could help us if something went wrong,” Scholtz says. “In contrast, with the dedicated systems we might be dependent on a single consultant or vendor: if they did well, we would have support, and if not, we would be stuck.”

Under Lawson’s leadership, a team of three people from Intervate and three others from JGM implemented a comprehensive and highly customized knowledge-management solution. In addition to its foundation in SharePoint Portal Server 2003, the solution relies on Windows® XP Professional operating system, Microsoft Windows Server 2003 operating system, Standard Edition, Microsoft SQL Server™ 2000, Microsoft Exchange Server 2003 communication and

collaboration server, Microsoft Visual Studio® .NET 2003 development system, and the Microsoft .NET Framework. SQL Server 2000 and Exchange Server 2003 are both part of Microsoft Windows Server System integrated server software.

Central to the customization, the team migrated existing protocols for creating documents based on predefined system-generated templates and for numbering and versioning those documents. The team also created project and collaboration work spaces with populated libraries and made existing libraries (and all related applications) available through a centralized intranet portal.

Benefits

Today, JGM has a robust and scalable intranet-based knowledge-management solution with timely and efficient support from Intervate. As Scholtz points out, the highly integrated solution was adopted quickly and easily and is significantly more stable than the prior solution. It also provides more extensive searching capabilities, stronger security, and more powerful remote access. Finally, it has proven to be a far more cost-effective approach than competing solutions and an ideal platform for future customization.

Working Faster and Smarter

According to Scholtz, users began accessing the basic functionality of the new solution in just a day or two and using virtually all aspects of it within a few weeks. “Ease of acceptance was partly because the new solution provided functionality similar to that of the prior solution and partly because users were already familiar with Microsoft products,” he says. “That’s an added advantage of using a Microsoft-based platform over one of the dedicated document-management systems. Users can make the most of the new solution without

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the delay of having to learn a different way of doing things.”

What’s most different about the new solution from the prior solution—and dramatically so, according to Scholtz—is the level of stability. “The new solution doesn’t freeze and doesn’t crash,” he reports. “It’s easy to open and close; provides everyone from secretaries to senior partners all the documents they need, whenever they need them; and remains stable and reliable even at the busiest times.”

Scholtz adds that because users can count on being able to access documents without risking a system freeze, they tend to work not only faster but also smarter. “Attorneys and staff members can devote their energies to serving clients instead of consulting with IT on how to recover from a crash or avoid another one,” he says. “They also know they can get work done when IT isn’t around—if they’re working nights or weekends, for example, which is common in our profession.”

Making the Most of the Knowledge Base

Enhanced research capabilities are yet another advantage for the attorneys at JGM. “Because SharePoint Portal Server 2003 supports searches on virtually any and every file type and format, and because of its sophisticated indexing mechanisms, we can access any document we want, and all through a centralized intranet portal interface,” Scholtz says. “Users simply select a library or database from a dropdown menu and enter basic category or keyword information, and the solution returns links to the documents they need within seconds.”

In the past, Scholtz explains, “We might spend a week searching through archives and still not necessarily find a given document. But today, we are virtually guaranteed to find any and every document

produced by this firm. This adds immeasurable value to work we have already done, including that of attorneys who may no longer even be with the firm.”

Enhancing Security and Mobility

Enhanced security is proving to be a powerful benefit of the new solution. “Because the solution relies on a SQL Server [2000] database, we can set security mechanisms that are far stronger than we could in the Microsoft Access environment,” Scholtz explains. “This makes the new solution worlds apart in terms of security and confidentiality.”

Security is especially important to a firm such as JGM, not only because its cases involve major transactions among some of the largest enterprises in South Africa, but also because its attorneys and their staff work so frequently from locations outside of headquarters. A high degree of remote access into the solution also means the firm must provide performance and functionality over diverse connections—and for Scholtz and his colleagues, the new solution does just that.

“Because the solution is based on an intranet architecture, users enjoy adequate functionality even when they have only a 35 to 45 kilobyte dial-up connection,” Scholtz explains.

For users accessing the solution over the Internet, the firm also has added virtual private networking (VPN) functionality, which saves significant costs on communications between Johannesburg and Cape Town. “For our attorneys who travel a lot, SharePoint Portal Server 2003 is making a massive difference in the ability to serve clients offsite,” Scholtz says. “The mobility enabled by this solution is worlds apart from what we had in the past—a space shuttle compared with an ox cart.”

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Building Future Functionality

Just as the firm is using the new solution for easily accessing existing and historical documents, it also will use the solution for accessing documents yet to be produced. “We can easily expand search capabilities to additional internal or external libraries, databases, and other Web-based resources,” Scholtz notes. “This is because the solution is so easily and cost-effectively customizable.”

For example, Scholtz explains that the firm could have implemented the same degree of customization with one of the dedicated systems—but that it would have been “prohibitively expensive” to hire all the external experts this would have required. “Even after extensive customization, the cost of initial implementation was barely one quarter the cost of some of the dedicated systems,” he points out. “Moreover, because maintenance has been easy, we fully expect ongoing costs to remain low, too.”

Another factor helping JGM to maintain control over ongoing costs is the solid relationship that the firm enjoys with Microsoft consultants. “Working with Microsoft we are virtually guaranteed broad access to a rich knowledge base and capable advisors,” Scholtz says. “This alone makes us realize that using any other solution would have been absurd.”

“Knowing the Potential”

As for building future functionality into the solution, Scholtz considers the Microsoft solution ideal. For example, he and his colleagues are adding a workflow area where attorneys can enter status reports for easy review by colleagues and managers. “With the prior solution, doing something like this would have been awkward and inefficient, but with our highly integrated Microsoft Office SharePoint Portal Server 2003 platform it’s very straightforward,” he says.

The workflow area is just the start of what Scholtz envisions ultimately for the solution. “Working with Intervate and knowing the potential of SharePoint Portal Server 2003, I see that we are using just a small part of the product’s functionality,” he says. “I also see that it will be easy to use more and more of that functionality, because SharePoint Portal Server 2003 operates so well with other products throughout the Microsoft family—which is not necessarily the case with the dedicated systems. All this makes it obvious that we just couldn’t do without this solution.”

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