



Law Firm Boosts Productivity, Client Satisfaction, Competitiveness with Web Portal

Overview

Country: Dominican Republic

Industry: Legal Services

Customer Profile

Founded in 1952 and based in the Dominican Republic, Pellerano & Herrera is a full-service law firm specializing in contracts, brands and name registration, mergers, and incorporations.

Business Situation

Pellerano & Herrera encountered inefficiencies in its reliance on manual methods of sharing information and its lack of a centralized point of access into diverse applications and databases.

Solution

Pellerano & Herrera deployed a portal solution based on Microsoft® technologies and through it provides 24/7 access to employees, clients, and their customers.

Benefits

- Contract processing 85% faster
- Employee productivity up
- Case tracking expedited
- Risk of error reduced
- Client trust enhanced

“The centralized portal access helps our attorneys and support staff to work more collaboratively, enhancing their job satisfaction and helping them to complete cases more quickly.”

Ricardo Pellerano, Partner, Pellerano & Herrera

Pellerano & Herrera, a prestigious law firm in the Dominican Republic, traditionally conducted business using a largely manual and decentralized communication and data-dissemination process. To address the inefficiencies of this approach, the firm deployed an information-management Web portal based on the Microsoft® Windows Server™ 2003 operating system, Microsoft SQL Server™ 2000, ASP.NET, and Web services. As a result, the firm is using its technology more efficiently, streamlining processes, and simplifying archiving and case tracking. The firm's 200 employees work more collaboratively since they can now access an archive of 240,000 documents through a single, centralized point. The firm's 60-plus forms used for gathering information are interactive, helping to ensure they collect comprehensive information. Case-tracking is fully automated and centrally accessible.

“A Pellerano & Herrera attorney and his or her client can know the up-to-the-minute status of a case at any time.”

Ricardo Pellerano, Partner, Pellerano & Herrera

“A process that used to take the bank three weeks can now be completed in two or three days. This makes the bank—our client—more competitive, and makes Pellerano & Herrera a more valuable partner for the bank.”

Nelson Taveras, Director of Operations, Pellerano & Herrera

Situation

Founded in 1952 and based in Santo Domingo, Dominican Republic, Pellerano & Herrera is a full-service law firm with more than 50 partners and associates and a support staff of 150. In a typical year, the firm processes some 10,000 cases, about 80 percent of which are corporate and focused primarily on loans, contracts, brands and name registration, mergers, and incorporations.

Like most law firms in the Dominican Republic, in the past Pellerano & Herrera relied on largely manual methods of sharing information, such as phone calls, messengers, and fax. This approach was frequently inefficient. For example, executing a contract for a bank loan began with a customer visiting a branch of the bank to fill out an application. After verifying credit, the bank generated all relevant documentation and delivered it by messenger to its main headquarters. It then delivered the application to Pellerano & Herrera, which reviewed the documentation, requested further information as needed, and so on. It was not uncommon for the customer to wait three weeks for the loan.

Even processes that Pellerano & Herrera had automated were plagued by inefficiencies. This is because the firm lacked a central point of access into the diverse applications it was using for document generation and tracking, enterprise resource planning, customer relationship management, time and billing, communications, project management, and other operations. For example, a client that had used Pellerano & Herrera for executing a contract might also use the firm for collections. But the divisions handling these respective operations relied on separate document-management systems, and so occasionally data that was already in one system was inadvertently reentered into another. This duplicate data

entry not only consumed valuable time but also increased the risk of error.

Solution

Pellerano & Herrera executives addressed their problems with a portal solution and built it using Microsoft® technologies because the firm had an extensive Microsoft platform in place. To design, develop, and deploy the solution, the Pellerano & Herrera team worked with Microsoft Consulting Services and with the Puerto Rico-based Consulting Resource Group. A Microsoft Certified Solution Partner, the Consulting Resource Group focused its efforts largely on developing the solution's workflow-management and case-tracking components.

Today, the Pellerano & Herrera portal solution is deployed to the firm's intranet, extranet, and Internet sites, offering employees and clients dynamic, 24/7 access. The portal is based on the Microsoft Windows Server™ 2003 operating system, SQL Server™ 2000, ASP 3.0, and ASP.NET; uses Web Services for document exchange with users accessing the portal through non-Microsoft platforms; and integrates with Microsoft Exchange Server 2003 and Microsoft Project 2003. Also integrated into the portal are two third-party applications: Hummingbird DocsFusion/PowerDocs for document management and CMS OPEN for time and billing. To integrate the Microsoft and third-party applications, the solution relies on Microsoft BizTalk Server messaging and business-process orchestration functionality.

The Pellerano & Herrera portal solution is available to the firm's 50 attorneys, 150 support staff, and a handful of corporate clients through desktop platforms outfitted with the Microsoft Windows® XP Professional operating system and Microsoft Office System Professional Edition 2003. To maintain a common desktop platform image, the firm relies on Microsoft Enterprise

Agreement Volume Licensing, which includes the Microsoft Software Assurance Program.

Benefits

The Pellerano & Herrera portal is a highly effective solution, enabling the firm to use existing technology more efficiently, to streamline common processes, and to simplify archiving and case tracking. As a result, Pellerano & Herrera is helping its staff to become more productive and making itself and its clients more competitive.

Leveraging Existing Technology

With the new portal solution, Pellerano & Herrera has made the most of a system built in the early 1990s to archive every document the firm generated since its founding. In the past, the firm's attorneys and staff members using this system for research had to search many different databases. Today, users can access any one of the system's nearly 240,000 documents through a single intranet Web portal. As Partner Ricardo Pellerano says, "The centralized portal access helps our attorneys and support staff to work more collaboratively, enhancing their job satisfaction and helping them to complete cases more quickly."

Making Clients More Competitive

The portal also simplifies access to any of the 60 or so forms that Pellerano & Herrera generates for contracts, brands and name registration, incorporation, and other legal proceedings. Through the portal and with the help of ASP 3.0 and ASP.NET, such forms are made interactive, which is especially useful for clients such as banks. "Traditionally, a new bank officer, for example, would call us to learn what kinds of questions and what-if scenarios to pose to a loan applicant," explains Pellerano & Herrera Director of Operations Nelson Taveras. "Now, depending on the information that officer enters into the form, it generates a complete list of the subjects that must be covered. The bank, the bank's customer, and our firm all save the

time of the phone call, and we can be more confident that the form has correct and complete information."

Interactive forms are just part of the reason Pellerano & Herrera's bank clients are processing loans more efficiently. As Taveras points out, through the firm's extranet portal at the bank, a loan applicant can complete an application, including documents that he or she scans in. "All communications between the bank and Pellerano & Herrera are conducted through e-mail, and the portal solution and applications associated with it generate all legal documents required for the bank to approve the loan," he explains. "A process that used to take the bank three weeks can now be completed in two or three days. This makes the bank—our client—more competitive and makes Pellerano & Herrera a more valuable partner for the bank."

Simplifying Case Tracking

Whatever the case, process, or document, by providing a centralized point of access the Pellerano & Herrera portal minimizes the odds of duplicate data entry, saving resources and reducing the risk of error. The portal also facilitates generating and maintaining comprehensive records. Because all documents are filed electronically and available through the portal, attorneys, support staff, and clients alike can access a continually updated archive. "A Pellerano & Herrera attorney and his or her client can know the up-to-the-minute status of a case at any time," Pellerano says. "Along with the greater overall efficiency of the portal solution, this helps Pellerano & Herrera to maintain client trust, which is the foundation of a successful legal practice."

For More Information

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For more information about Consulting Resource Group products and services, call (787) 758-6046 or visit the Web site at: www.crgpr.com

For more information about Pellerano & Herrera products and services, call (809) 541-5200 or visit the Web site at: www.phlaw.com

Microsoft Windows Server System

Microsoft Windows Server System integrated server infrastructure software is designed to support end-to-end solutions built on Windows Server 2003. It creates an infrastructure based on integrated innovation, Microsoft's holistic approach to building products and solutions that are intrinsically designed to work together and interact seamlessly with other data and applications across your IT environment. This allows you to reduce the costs of ongoing operations; deliver a more secure and reliable IT infrastructure; and drive valuable new capabilities for the future growth of your business.

For more information about Windows Server System, go to: www.microsoft.com/windowsserversystem

Software and Services

■ Products

- Microsoft Office 2003 Professional
- Microsoft BizTalk Server 2002
- Microsoft SQL Server 2000
- Microsoft Windows Server 2003 Enterprise Edition
- Microsoft Windows XP Professional

■ Technologies

- Microsoft ASP.NET

- Web Services

Hardware

- Dell PowerEdge
- Compaq 2500
- Compaq 5000
- Compaq 7000
- Dell Optiplex GX1
- Dell Optiplex GX100
- Dell Optiplex GX150

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