

## Leonard Street and Deinard Realizes its Matter-Centric Vision with Interwoven

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STREET  
AND  
DEINARD

Uncommon Wisdom  
Common Sense®

Serves clients ranging from individuals and start-up businesses to Fortune 500 companies across every sector of the economy: commercial, service, financial, health care, manufacturing, and industrial.

### Industry

Legal

### Geography

Minneapolis, Minnesota and Washington, D.C.

### Challenges

- Organize the firm's 1.5 million documents in a more meaningful structure, including grouping related documents of different types together
- Foster collaboration by enabling users to search firm-wide work content more effectively
- Improve alignment between paper and electronic records

### Benefits

- Enabled attorneys to find relevant material of all document types faster and more efficiently through electronic matter folders
- Improved collaboration by implementing a uniform organizational model for work content firm-wide
- Established a common folder structure for paper and electronic records, laying the foundation for more efficient records management



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—Terry Pressley, director of IT, Leonard Street & Deinard

Founded in 1922, Leonard, Street and Deinard has a long tradition of delivering innovative legal services to clients. Internally, the firm's clear vision for the best way to organize its practice has at times left its technology providers scrambling to keep up.

In recent years, Leonard Street's staff, including 180 attorneys in addition to paralegals and secretaries, had become frustrated with the difficulty of organizing and finding the content their work depended on—especially since related documents of different types couldn't be grouped together. "We created searches for them, but it wasn't the easiest way to work," recalls Terry Pressley, director of IT, Leonard Street & Deinard. "With about 1.5 million documents in the system, that's a lot of sifting."

As long ago as 1999, the firm knew exactly what its staff needed: a matter-centric document management system that would allow users to organize documents of all kinds by matter within unified folders, along the same model as traditional physical files. At the time, no such solution was available. "We had to wait until somebody got it right," says Pressley, "and then Interwoven finally did."

### Finding a technology partner for the long term

Interwoven WorkSite made Leonard Street's decision easy. The solution's matter-centric collaboration model was a perfect match for the firm's longstanding DM vision, and its integrated e-mail management, which allows

users to drag messages directly from their inbox to a matter-centric WorkSite folder, stood out from the competition. More broadly, "Interwoven is innovative and listens to customers, and the WorkSite product is solid, mature, and well-integrated," explains Pressley. "We were confident the company could keep pace with us as a long-term business partner."

Following a town hall meeting featuring an Interwoven demo, the firm's users had only one reaction: This is what we need—when are we going to do it?

While Leonard Street planned its implementation carefully, its guiding philosophy was one of openness and flexibility. Anyone in the firm would be allowed to create a new folder in any area, and users from each of the firm's practice groups and administrative departments were selected to design the workspace for their group. Simplicity was also a key factor, to ensure complete adoption.

In March 2006, Leonard Street worked with Interwoven partner ADV to roll WorkSite out to a pre-pilot group, then a formal pilot. At the end of the month, ADV and Leonard Street converted the entire firm: 400 users, as well as more than 1.5 million documents—over a single weekend. "It went very well," says ADV's Bryce Ostenson. "The firm had communicated extensively with end users throughout the project, and it really prepared people for the change."

## **A Matter-Centric vision becomes a reality**

Interwoven WorkSite now serves as Leonard Street's definitive repository for electronic information, from work in progress and final documents to e-mails and voicemails. The solution's open architecture has enabled extensive integration with other systems to create a highly efficient, unified matter content environment. When a new client matter is initiated in the firm's time and billing system, WorkSite automatically generates a corresponding matter workspace, using the specific law code to pre-populate a template with the appropriate folders and database paths. The firm is also implementing a scanner to file external materials, such as interrogatories, into WorkSite within the same matter-centric environment.

With the system in place, Leonard Street attorneys, paralegals, and secretaries in any location can search and access firm-wide matter content far more easily than before. "It's a fundamental change in the way we operate," says Pressley, who observes that the system's flexibility has accommodated a broad range of user preferences. "Some of our users prefer a strictly hierarchical structure, accessing content by navigating through folders. Others prefer to search. Both types can co-exist easily in WorkSite, and find what they're looking for with equal speed either way."

## **Supporting a culture of collaboration**

WorkSite has helped Leonard Street build stronger, more efficient collaboration by providing a uniform organizational scheme for all matter content. Attorneys, paralegals, and secretaries know exactly how and where to file any document, and they also know where to look for the content they need. "One guy in construction litigation went to a site and took 20 photographs, then popped them into a folder," says Pressley. "Now all the attorneys on that case can see them. That's powerful stuff." Another young attorney used WorkSite to impress a client with the firm's capabilities, showing how quickly he could find any given item the client might want to see.

## **Laying the foundation for better RM**

Like most law firms, Leonard Street faces the challenge of managing rising volumes of electronic records while keeping pace with the requirements of its physical records. Back in 2000, the firm created a file structure within its physical RM system that was intended to serve as a common model for records of both types. This model provided the starting point for the firm's matter-centric implementation. "It's a good working model that users understand now, and it also lays the foundation for closer alignment moving forward," explains ADV's Ostenson. When a matter closes, the firm's RM and Conflicts group will harvest both physical and electronic documents—a process greatly simplified by the close alignment of the two systems.

As always, Leonard Street continues to look to the future. The firm's intention has always been to make its document management system available through its portal—not only for internal users, but also for clients. Interwoven's close relationship with Microsoft and its integration with the SharePoint server provided yet another key driver in the firm's decision to move forward with WorkSite, and its users and clients will soon reap the benefits.

Having finally found a technology partner capable of making its vision a reality, Leonard Street will continue to pioneer best practices and cutting-edge service for its firm and its clients.

## **Solution**

**Interwoven WorkSite 8** powers electronic matter folders for Leonard, Street and Deinard. The Interwoven solution provides integrated document management and e-mail management within a single environment, making it easy for the firm's professionals to manage, store, and collaborate efficiently around complete matter content from any location. Integration with the firm's time and billing system and structural alignment with its records management system further extend the solution's benefits.

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