

True Matter-Centricity For A Corporate Law Department

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SAINT-GOBAIN
CORPORATION

Saint-Gobain Corporation employs approximately 24,000 people across the U.S. and Canada at approximately 160 plants and more than 160 distribution outlets. Among its best-known brands are CertainTeed® and Norton. Saint-Gobain Corporation specializes in the production of building products for the residential and commercial construction industry; high-performance materials, including abrasives, ceramics, plastics, and reinforcements; and glass bottles for the food and beverage industry. Its parent company, Compagnie de Saint-Gobain, has annual sales of about \$60 billion, operations in more than 50 countries, and 207,000 employees. Like any diverse company, it's imperative that Saint-Gobain Corporation stay ahead of the curve when it comes to technology and processes that enable it to stay agile, competitive and compliant.

As law office administrator for the corporate law department of Saint-Gobain Corporation, one of the most important functions of my job is to ensure that a team of 43 employees in three locations has the IT infrastructure in place to do their jobs efficiently and productively. In 2006, when we learned that our document management vendor would be moving to a new platform and would no longer be supporting our application, we embarked on a quest for a top-of-the-line, flexible DM system that would meet our current needs and be pliable enough to evolve as the department grew.

At the time, our document management system had been in place for 13 years and met the department's needs nicely. However, we were on borrowed time, and needed to make a decision about where to turn for the next generation of document management for the law department.

Mission: Matter-Centricity

We knew that moving to a new DM product would be a drastic change for the department after 13 years of using the same system. Given that, I assembled a team to help me research and evaluate the DM options in the marketplace for law firms and law departments. Our team was comprised of seven people: myself plus one attorney and one paralegal/or assistant from each of our department's three main practice areas.

The team's first order of business was to create a wish list, i.e., determine what features we wanted in a new DM system. We established that we wanted a solution that allowed for ramped-up security and searchability, and integrated easily with Microsoft Outlook. Secondly, because our department was

spread across offices in three cities (Valley Forge, PA, Worcester MA, and Tampa, FL), the product had to be capable of utilizing a centralized design and the firm's WAN to deliver DM to the three separate locations with one server.

Most importantly, we wanted a solution that was legal-specific and matter-centric, allowing us secure and reliable access to documents. With these criteria in mind, we began evaluating the available products in the market.

Enter Adaptive Solutions, Inc.

After ruling out several possible vendors for various reasons, our team decided to bring an IT integrations specialist to the table to help us further evaluate the market offerings. We called in **Adaptive Solutions, Inc.**, as one of their principals had helped us implement our DM system more than a dozen years earlier. The specialists at ASI listened to our desired criteria and suggested that we evaluate Interwoven WorkSite, a legal-specific DM system that offered true matter-centricity.

The team from ASI took our group through a comprehensive demonstration of Interwoven WorkSite and its capabilities. Knowing that a change in our DM system would mean a drastic change in the department's day-to-day operations, members of the team paid close attention to the user interface and depth of the potential learning curve as well as the degree to which Interwoven could help Saint-Gobain Corporation's law department move to a matter-centric environment.

One of the most obvious advantages of Interwoven WorkSite was that it interfaced directly with Microsoft Outlook. Instead of having to profile each and every document, email, PowerPoint, etc. and then move the file to its appropriate location, WorkSite featured "drag and drop" functionality, which would allow users to move emails and documents with little or no profiling. This was a significant change from our previous solution, and our evaluation panel could see the potential time-saving advantages of WorkSite in this initial demo.

Diving Into Interwoven

With its promise of a legal-specific, matter-centric environment, ease of use, and easy integration with Outlook, our DM team decided to move forward with the WorkSite integration. We received final signoff from the company's general counsel, and engaged ASI to help with the preparation, product customization, implementation and training on Interwoven WorkSite.

ASI and Saint-Gobain's technical team began the conversion process in the spring of 2007. First, ASI established a schedule and timeline, setting the last week of August 2007 for the actual changeover. Then ASI and the in-house project team solicited user feedback and suggestions on how the WorkSite workspaces should be created to meet the department's specific needs.

Armed with the user feedback, ASI used Interwoven's Workspace Manager Tools to design an automated folder

structure where new documents inherit the parent folder's profile metadata each time a new document is saved to the DMS.

Just prior to the actual implementation, ASI demoed the new product to the entire department in the Valley Forge office and invited one final round of user feedback and comments. Viewing the product in this semi-final format was very helpful and sparked changes in the templates which had been set up for matters in our four functional areas (litigation, environmental, corporate law and intellectual property). This final development step truly customized the product and helped to eliminate sticking points and increase buy-in, always one of the major hurdles of a new product installation.

The actual switchover to WorkSite took one night. When users arrived at work the next day, the system was in place and ASI floor support was available to help users acclimate to the program. ASI had held training sessions during the day of the overnight conversion.

A Recognizable ROI

Six months following the implementation, Interwoven WorkSite has proven to be the right DM product for Saint-

Gobain Corporation's law department. Key advantages include collaboration, security and the full-text search functionality. The department is able to assign security down to the document level, ensuring confidentiality as needed. The full-text searching means even easier access to documents for users who may not know precisely where a document is filed. Users are now able to save an e-mail message by dragging it to the appropriate folder without ever having to leave Outlook. Moving forward, as our users become more accustomed to the product, we will continue to encourage electronic filing of all documents.

ASI's involvement was an important component of the success of the Interwoven implementation. The ASI team was knowledgeable, truly knew the legal landscape and the specific needs of our department, and their centralized design helped drive down licensing costs and post-implementation support. The team was professional and technical but still relatable to non-technical department members. ASI's guidance and design, coupled with the superior WorkSite product, allowed Saint-Gobain the many advantages that come with a first-class document management system.

Partners Notes

Holland & Knight To Partner With Fordham Graduate Business School

Holland & Knight will partner with Fordham Graduate Business School to establish and sponsor the Fordham Institute for Family & Private Enterprise.

The new Institute is the first university-based center devoted to assisting family-owned businesses located in the New York City area achieve their business goals through educational seminars, networking events and other membership activities. Fordham is the first and only university in the area with a dedicated institute serving the educational and networking needs of family-owned businesses.

Holland & Knight is the sole law firm involved in the project. Holland & Knight lawyers will participate in the Institute's seminars and events, addressing important issues for family-owned

businesses such as family governance, business succession, tax and estate planning and transfer of ownership.

Deborah T. Haddad has joined Holland & Knight's Chicago office as a partner in the Real Estate Transactions Group.

Ms. Haddad has more than 25 years of experience. Her practice is focused on the acquisition, development, construction, financing, joint venture structuring and disposition of property. She previously served as senior vice president of Lennar Corp. and general counsel of Concord Homes. She is a member of the Executive Committee of the Chicago District Council of the Urban Land Institute and serves on the ULI Preservation Compact Committee.

Goodwin Procter Strengthens Securities Group With Addition Of Two Attorneys

Goodwin Procter has announced that Michael D. Maline and Martin C. Glass will join as partner and counsel, respectively, in the firm's 200-lawyer New York office. Both are corporate attorneys focused on equity and debt capital markets transactions, as well as generally counseling on securities law matters.

Prior to joining Goodwin Procter, Mr. Maline was a member of the Corporate Department at Lowenstein Sandler PC, where he advised clients in a wide range of corporate and securities law matters. He has extensive experience representing underwriters and placement agents

in connection with public securities offerings, registered direct transactions, PIPEs and other private placements in the life sciences, technology, consumer products, gaming, oil and gas and alternative energy sectors.

Mr. Glass joins from White & Case LLP, where he advised issuers, underwriters and other participants in the full range of securities transactions, including global and domestic public offerings, Rule 144A and private equity transactions. He also has extensive experience in representing Canadian and other non-U.S. companies in their securities activities in the U.S.

Annette Scholl is Law Office Administrator at Saint-Gobain Corporation. Adaptive Solutions Inc. provided our readers with this case study.

For further information, contact www.manzoritchie.com.