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LEGAL

TÜV Rheinland relies on Custodian for Legal from Transform Data International for file management, matter assignment and reporting

TÜV Rheinland, one of the leading inspection service providers in the areas of safety, efficiency and quality, has chosen Custodian for Legal™ powered by Intapp from Dutch business software specialist Transform Data International, as its new global solution for electronic management of legal cases and automated reporting.

The German auditing organisation with a tradition of almost 150 years planned to replace the locally used file management systems with a modern global solution. The company was looking for a system that would require less administrative attention, promote transparency and

enable automated key figure-based reporting on the large number of processes for internal stakeholders.

Transform Data recommended Custodian for Legal, a comprehensive file management solution based on Intapp OnePlace Collaboration & Content with functionality for various aspects of client, case and broader project management. The software seemed ideal as it could be easily integrated with TÜV Rheinland's local SharePoint systems and paved the way for a possible future migration to Microsoft 365 / SharePoint Online.

TÜV Rheinland had 5 key requirements for the optimisation of the existing case management systems and reporting, which are supported by the new solution:

Capture of relevant information

Efficient work is important in view of the large number of cases from the areas of contract law, company law, brand, M&A and claim management that the Legal Service function of the TÜV Rheinland Group has to handle worldwide. In order to be able to deal with legal issues in a targeted manner and not to waste unnecessary time on queries, it is important that as much relevant information and documents as possible are already received by the Legal Service function together with the enquiry from internal clients.

With the help of the input mask of Custodian for Legal, which is to be made available to internal clients as an app via the TÜV Rheinland intranet, all relevant information on the enquiry, including electronic documents, can be made available as attachments right from the start.

Automated assignment of matters

In order to be able to provide answers as quickly as possible despite a high number of enquiries, TÜV Rheinland considered it important that enquiries from internal clients should be automatically assigned to the correct legal responsible within the Legal Team. In order to achieve this, internal clients fill out an input mask in which important assignment information such as business area, region and legal area is entered. Transform Data's routing and notification mechanism checks these properties for all incoming requests and notifies the members of the Legal Team who are assigned as responsible for the respective combination of assignment criteria. The routing logic can be managed by TÜV-Rheinland administrators themselves, as all information is created in standard SharePoint lists.

Monitoring the response time

TÜV Rheinland's legal service function has agreed fixed response times for legal advice with its internal clients. The agreed response times vary according to the respective legal area and the urgency of the request. Transform Data's routing and notification solution takes these different response times into account and notifies the legal team when the end of the response period is approaching. This makes it easier for the Legal Team members to keep track of response deadlines and to respond within the deadlines agreed in the internal SLA.



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KPI reporting

With Custodian for Legal, users can update the status of their transactions. They can, for example, confirm that legal questions received have been received or answered by the responsible team member, or mark cases as currently on hold. These status settings provide valuable information for SLA / KPI reports and provide the legal team with helpful insights throughout the lifecycle of a case.

Outlook as primary interface

In order to make the change as easy as possible for the members of the Legal Team and to promote maximum acceptance, TÜV Rheinland asked the members of the Legal Team whether a stand-alone tool or a tool integrated into Outlook would be preferred before selecting the new tool. It turned out that the vast majority would prefer an Outlook integrated solution. As Custodian for Legal offers a very detailed native Outlook integration, users require only minimal training to get used to the new tool and to use Outlook as the standard interface for file management.

User-friendly implementation

Custodian for Legal enables the legal team to work even more closely together and to carry out administrative work, which was previously done manually with increased effort, more efficiently and in automated form.

We appreciated the close and constructive cooperation with the Transform Data team because we were aware that a finished product "off the shelf" would not meet our requirements. The combination of extensive technical experience and knowledge of how Transform Data's legal departments work helped us to find the ideal solution." said Jörn Trögel Deputy Head Corporate Legal of TÜV Rheinland AG.

Everything in its place

In addition to meeting TÜV Rheinland's original requirements, the functionality of Custodian for Legal and the fact that the tool improves the return on investment in existing Microsoft software made a difference for TÜV Rheinland. The new system allows teams to reduce internal email communication, for example, by storing incoming case-related messages directly in the right files for immediate access and information by members of the relevant legal team, worldwide. This can reduce the need for staff to distribute emails and attachments to keep other team members informed.



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