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A TRANSFORM DATA SUCCESS STORY




custodian
for legal

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FOR **ACCOUNTING**
& **CONSULTING**

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Dennis Ruzius, operations manager at Atlas



Atlas transforms client, matter and project management with Custodian for Legal from Transform Data

Atlas is an independent tax law firm in the Netherlands, with its office in the city centre of Amsterdam. Branded under the name T/A International, the growing business has entered into a significant strategic partnership with Tiberghien, another leading tax law firm with a strong presence in Belgium and Luxembourg. Combined, the two firms have formed an impressive tax network across Benelux, providing access to more than 100 dedicated tax lawyers

across three jurisdictions, via offices spanning Amsterdam, Eindhoven, Antwerp, Brussels, Ghent, Hasselt and Luxembourg.

To maximise the potential and performance of this powerful market proposition, it is critical that teams across this powerful tax law network can collaborate effectively and efficiently, both internally between different geographical locations, and externally with clients.

Consolidation provides the key to expansion

As part of this plan, it made sense for Atlas to consolidate all client, matter and project management information, document management and activity notes on a shared platform common to all legal and tax professionals. Crucially, Atlas wanted to make use of its existing Microsoft Office/Dynamics 365 environment, its standard platform for day-to-day operations which is trusted and highly secure.

To minimise any disruption to users, and to drive maximum take-up, Atlas set out to find an intuitive, easy-to-use system: one that would feel comfortable and familiar to professionals and administrators, rather than require a departure from the way they already worked. Having some clear controls to keep client, matter and project management on course, and to allow clear visibility for all those involved in a particular client engagement, was essential too.

Atlas's initial priority was to find a good central document management system (DMS), to support document sharing and collaboration across the expanded organisation. Yet, the more that Atlas mapped out its requirements and surveyed the potential options, the more it realised that these extended beyond document and email management capabilities.

Seeing is believing

Dutch business software specialist, Transform Data International, introduced Atlas to Custodian for Legal™, a collaboration and document management solution based on Intapp OnePlace Collaboration & Content. The software has been specifically designed to meet the needs of legal teams, with capabilities for every aspect of client, matter and broader project management. Easily integrated with Office 365, it runs natively within the platform, to deliver high performance in a way that feels natural and familiar to users.

The fact that Custodian for Legal could be integrated so readily with Atlas's existing Dynamics 365 system, and with Outlook – demonstrated via a proof-of-concept with a number of users – was highly appealing. The Atlas team was impressed. This would allow users to do more with software they already had, and without any special need for training.

It was this demonstration that clinched Atlas's choice, Custodian for Legal from Transform data. "Custodian for Legal surprised us in a positive way, both at a technical level and with regard to ease of use," comments Dennis Ruzius, operations manager at Atlas. "After the successful proof of concept, we started the implementation."



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Everything in its place

In addition to addressing Atlas's initial requirements, Custodian for Legal has delivered a number of other significant organisational and administrative benefits. For instance, the new system enables teams to further reduce internal email communication, as incoming matter-related messages could be filed directly into relevant dossiers for immediate access and sharing information, alleviating the need for individuals to circulate emails and attachments to keep colleagues updated.

Meanwhile, advanced Search functionality provided via the Office 365 tool, Qwickr, which harnesses the metadata from SharePoint and Dynamics 365, means users can search a large set of files with ease, and quickly refine, sort and group results, saving valuable time that might otherwise be spent looking for information.

Importantly, 'Clients' and 'Projects' in the Custodian for Legal system are tightly aligned with Dynamics 365, so that users can track the status of a client or a project effortlessly. The full matter lifecycle is managed within the system too, including case archiving and retention.

Transform Data has connected Custodian for Legal to Microsoft Dynamics using its Qconnector synchronisation tool, so that when data is added or amended in Dynamics 365, updates are automatically reflected in Office 365/ Custodian for Legal.

Atlas also plans to integrate automatic email communication from Dynamics 365 with Custodian for Legal. This will mean that all information and communication, including automated messages such as billing messages or reminders, are made available to users within the familiar interface of Outlook, and displayed in context of the relevant client or project.

Secure client portals

Clients, too, are benefiting from the consolidated collaboration environment. As well as experiencing teams' greater efficiency they themselves can collaborate more directly and efficiently with their legal tax experts via secured data rooms. What's more, Atlas can provide these client portals at no additional cost, as this is all facilitated via the firm's existing Office 365/Custodian for Legal environment, supported by strong security and information policy controls.

Atlas has been particularly impressed with how professional and seamless the engagement with Transform Data has been. "Our collaboration has worked very efficiently. Transform Data has undertaken many projects of this nature, and is able to bring to bear best practices from other implementations. This made it very easy for us to design the system," Dennis says. "The project team worked hard to implement this solution in a short timeframe, which has resulted in a close and committed relationship between our two organisations."

Atlas

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