

 transform data

A TRANSFORM DATA SUCCESS STORY

custodian 
for legal

SOLUTION IS NOW CALLED

TRANSFORM DATA
FOR LAW FIRMS Boels
Zanders
Advocaten

Boels Zanders introduces modern, flexible working with **Custodian for Legal from Transform Data**

Boels Zanders is a full-service law firm, based in the south of the Netherlands with an international reputation. With offices in Eindhoven, Venlo, and Maastricht, the firm services the day-to-day legal needs of entrepreneurs, business leaders and administrators of SMEs, large corporates, public sector, healthcare and non-profit organizations.

Boels Zanders maintains its leading position in

this fast-changing market by using IT to enhance its client service. Together with Transform Data, Boels Zanders continuously explores new ways to maximize the use of its existing platforms in order to meet business goals and optimize processes. Recent years have seen a significant transformation in the IT landscape with a migration to the Cloud and the introduction of Custodian for Legal.

Migrating from on-premise to the Cloud

Lawyers need to work effectively from different locations, however the existing Citrix solution did not always offer seamless access if internet connectivity was limited. Moreover, connectivity aside, Citrix was expensive in terms of hardware and maintenance. Boels Zanders therefore wanted to provide all users with laptops with Windows 10 and automatic updates via a schedule that would not disrupt the lawyers' daily caseload.

To achieve this goal, Boels Zanders migrated 70 on-premise servers, which managed load-balancing, redundancy back-ups and hardware upgrades, to Microsoft Office 365 and Microsoft Azure. The number of servers has been reduced significantly but the remaining ones now run in the secure Azure cloud while Microsoft handles back-ups, hardware and redundancy. Azure offers the scalability to adjust resources when extra processing power is needed while Boels Zanders only pays for the resources it actively uses, thus significantly reducing operational costs.

"We're very happy with the move to the Office 365 and Azure platform," explains Jos Meuwissen, IT Manager, Boels Zanders: "The rapid provision of new updates, functionalities and even completely new innovative applications gives us the ability to quickly act on new business and client needs."

Introducing Custodian for Legal

The existing document management system (DMS) had been in place at Boels Zanders for many years incurring high maintenance costs and with limited functionality in terms of meta-data, reporting, staff department access and offline capabilities. In addition, it was typically configured only for a client/matter set-up and not flexible enough to adopt to meet the needs of a staff department such as HR. Boels Zanders therefore decided to migrate to Custodian for Legal, a collaboration and document management solution based on Intapp OnePlace Collaboration & Content, provided by Transform Data, which provides matter management capabilities on top of Office 365 and SharePoint while retaining the familiar Microsoft Outlook interface.

Custodian for Legal's more generic approach ensures solutions can have unlimited meta-data fields and support practical things as multi-value meta-data and non-client/matter structures which is a key requirement to build practical solutions that meet the needs of all staff departments, including HR.



www.transformdata.eu

"The rapid provision of new updates, functionalities and even completely new innovative applications gives us the ability to quickly act on new business and client needs."

Jos Meuwissen, IT Manager, Boels Zanders

Transform Data's carefully planned migration approach from iManage Work to Custodian for Legal and provided a seamless transition for end-users and the IT department.

Qwickr and Qontext for efficiency

Boels Zanders users need to find information, refine results, group data sets and preview documents as fast as possible. Furthermore, specific documents or locations of interest to users must be marked for following, notifying users in case something changes. Transform Data deployed Qwickr, which harnesses the metadata from SharePoint, to meet these needs and ensure users can work efficiently. Another Custodian for Legal add-on, Qontext, was implemented to aggregate information from various systems, including PMS, CRM and DMS, and to display the relevant information in context by offering a user-friendly portal, which integrates into Outlook and Microsoft Teams.

The road ahead

Innovation never stops and Boels Zanders is continuously looking to further optimize its environment for both internal users and clients. In the short term, the company expects to integrate its Neota Logic platform into the Office 365 and Custodian for Legal solution, allowing it to provide self-service applications, such as contract generators, to clients via SharePoint collaboration rooms and Microsoft Teams.

"We're enjoying the close collaboration with Transform Data and we're pleased that they listen to us and to our users, trying to understand how they want to work and how they can be more productive," concludes Nicole van Rossum, Office and Process Manager, Boels Zanders. "By adopting solutions such as Qwickr and Qontext, we can ensure maximum added value and efficiency to our users."



www.boelszanders.nl