

Fenwick & West LLP

Law Firm Enjoys Speed, Security, Flexibility of Enterprise Search



**INCREASED
ATTORNEY
EFFECTIVENESS**



**ENHANCED
RESPONSIVENESS
TO CLIENTS**



**GREATER REUSE
OF FIRM
KNOWLEDGE**



**SIGNIFICANT
PAYBACK ON
ATTORNEY TIME**

“We moved from an underperforming search environment to an enthusiastically received search implementation. When all is said and done, enterprise search in a law firm is about increased attorney effectiveness that enhances client services.”

— **MARK GEROW**
*Director of Application
Development & Business
Process, Fenwick & West*

For increased collaboration and productivity, leading law firm Fenwick & West turned to BA Insight to implement and deploy a world-class enterprise search solution built upon Microsoft Office SharePoint and BA Insight's Software Portfolio. Today, Fenwick & West attorneys and other employees are enjoying greater access to internal information and reuse of firm knowledge; resulting in increased value delivered to clients.

The Situation

Established in Silicon Valley in 1972, law firm Fenwick & West provides a full range of legal services, with a special emphasis on the legal and business issues facing technology companies, and is continuously on the cutting edge of legal issues arising from emerging technologies.

The firm's 300 attorneys and 200 staff members work from four offices in the United States located in Silicon Valley, San Francisco, Seattle, and Boise. Vault names Fenwick & West among the 100 most prestigious law firms in the nation, and the firm's practice groups are continually ranked among the top in the United States. Some of the firm's better-known matters include landmark M&A transactions such as the largest Internet merger in history (VeriSign's \$21 billion acquisition of Network Solutions) and the largest software merger in history (Symantec's \$13 billion acquisition of VERITAS), groundbreaking IPOs of Intuit, eBay, VeriSign and Oracle, and watershed IP litigation, such as defense of Amazon.com's 1-Click® patent and defense of Elan Pharmaceutical's patents on transgenic mice.

Delivering first-rate innovative legal services and also serving as effective business partners with its clients is integral to the Fenwick & West practice. To provide that value to clients, attorneys and staff members require access to all relevant information quickly and securely. Fenwick & West identified that the separate search functions built into each DMS was insufficient to serve client demands, and it needed a true enterprise search solution to do its work efficiently.

Years ago, seeking a more powerful and consistent approach to information, knowledge management and collaboration, Fenwick & West deployed Microsoft SharePoint as the foundation of a new intranet and the basis of a new enterprise search solution. At the same time, to maximize this investment, the firm recognized that it would need a way to provide employees accelerated and secure access to business system data from the SharePoint portal.

The Solution

The objective was to bring all of the firm's information and knowledge sources into one easy-to-use location so that Fenwick & West's attorneys and staff could quickly find complete and relevant information, regardless of the data's origin. Out of the box,

SharePoint enables searching of portal documents, file shares, other websites, and Exchange public folders. This is a good basis to start from, but insufficient to meet the search needs of a law firm. Therefore, Fenwick & West continued to evaluate external search solutions based on Microsoft SharePoint technology and decided that BA Insight's Software Portfolio made the most sense for their requirements that included: speed, security, flexibility, and complete and relevant results.

Speed and Security

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"We were happy to report that in our initial tests, SharePoint Search is quite fast. A search for a complex litigation term across three DMS document stores, our external website (SharePoint) and several line-of-business databases returned 2,560 hits in 1.22 seconds. And, making it faster is essentially a technical problem that can be addressed by adding hardware and/or segmenting content sources," recalls Mark Gerow, Director, Applications Development and Business Process.

SharePoint relies on one of two mechanisms for securing search results so that only the appropriate people see the items they are allowed to see; either ACL security or real time security trimming. ACL security is highly scalable, but cannot be used easily to secure non-AD based systems. Real time security trimming is non-AD dependent and can be used to secure most systems, but is limited to only the first few hundred results. Neither alone is sufficient for a law firm with millions of matter items spread across multiple systems, where security can change by the minute.

"Being able to combine the two security models was paramount to the success of our enterprise search implementation. We were able to include our non-AD systems in the SharePoint index securely and handle searching millions of documents without performance lag," says Gerow. "Shortly after release of the DMS search component the portal team received calls questioning whether SharePoint Search was reflecting the underlying DMS security policy. In each case, the research showed that SharePoint was faithfully reflecting the underlying policy."

Breadth and Relevancy

A key element to deploying a complete enterprise search solution rests in the ability to connect to the firm's enterprise systems. Fenwick & West required the ability to index their Hummingbird DM and Interaction CRM stores for search in SharePoint in order to present a complete set of results to attorney and staff searches. Speed and security accounted for, Fenwick & West sought to further improve the relevancy of these results.

Prior to indexing, firm administrators can leverage data relationships across multiple systems to extend the searchable metadata. Through simple formatting and also advanced scripting options, administrators can tailor the data to any format.

"The incorporation of DMS and database content sources has allowed us to make SharePoint a one-stop-shop for our user's search needs. In an information intensive profession such as legal this leads to significant time savings which translates into better service for our clients," explained Gerow.

To further enhance the relevancy and usability of Search, Fenwick & West implemented an improved search interface. When users receive results, they will be presented with the most relevant page in the document immediately for preview. Then users can take immediate action on data directly from the search result by clicking any of the links presented in the result. **Benefits**

With a more powerful, more flexible enterprise search solution, Fenwick & West attorneys and staff members are more efficient in their work and more responsive to clients. The firm is also adding significant savings due to improved knowledge management and conservation of resources.

"While we have not performed a formal ROI analysis we believe there's been a significant pay-back to our attorneys, staff and clients, given the information intensive nature of our business coupled with the high value of legal professionals' time. Less quantifiable, but as

important, is the increased depth of research possible due to rapid access to information across all our knowledge repositories,” says Gerow.

Fenwick & West attorneys and staff now enjoy faster access to the right information, which helps them to unify their processes and perform their tasks more expeditiously. Users can get faster search results and view pages more quickly, assured that the most relevant items are listed first.

Search is one of the most commonly used features at the firm, and the improvements to search at Fenwick & West are significant. Now, when a user performs a search, the results are displayed in seconds and the desired document is usually among the first few results returned. “This new search tool has increased my productivity by orders of magnitude,” enthused one Fenwick & West attorney.



As an innovator in the Cognitive Search Market, BA Insight's best of breed approach helps companies make search intelligent by providing technology that connects machine learning, cognitive computing, and enterprise systems, powering a new generation of intranets and cognitive search solutions.

Hundreds of organizations and over 3.5 million users benefit from our software on a daily basis. We serve visionary organizations such as Australian Government Department of Defence, CA Technologies, Chevron, DLA Piper, Keurig Green Mountain, Mars, Pepsi, Pfizer, and Travers Smith.

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