



Legal Firm Wins with Supercharged Productivity Solution

Microsoft Office System Customer Solution

Case study

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James W. Ryan
Managing Partner
Frazer, Ryan, Goldberg, Arnold & Gittler

Frazer
 Ryan
 Goldberg
 Arnold &
 Gittler LLP

Frazer, Ryan, Goldberg, Arnold & Gittler is a small, successful law firm that had spent 2002 consulting with experts as it sought to improve its overall productivity—essentially, to help its management and staff be more billable. Installed in a single weekend, Microsoft Office Professional Edition 2003 and Microsoft Windows Small Business Server 2003, with Windows SharePoint Services, had an immediate impact on the firm’s ability to generate more income. The overall annual time savings (the ability to bill additional time) could be as much as several hundred thousand dollars the first year.

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
Frazer, Ryan, Goldberg, Arnold & Gittler (FRGAG) is a 28-person law firm located in Phoenix, Arizona. Practice areas are commercial litigation, employment law, estate planning, mental health and elder law, real estate, tax and business planning, and tax controversy matters.	The law firm faced three primary business challenges: lack of integration among its communication tools (email, scheduling, tasks), the need for more robust remote network access and management, and inefficient information storage and retrieval. Overall, FRGAG was looking for a solution that would increase productivity for the company.	The solution included upgrades to the firm’s infrastructure on the server and the desktop with Microsoft Office Professional Edition 2003, Microsoft® Windows® Small Business Server 2003 Premium Edition, and Windows XP Professional. Six new profit center team sites were set up to improve information sharing and document retrieval. The array of integrated communication tools found in Microsoft Office Outlook® 2003 replaced the old scheduling software. And an enhanced remote network access solution was deployed.	<ul style="list-style-type: none"> Integration of communication tools generates more billable time. Simple setup and network management saves over U.S. \$350,000 per year. Document production is accelerated by the use of Windows SharePoint Services sites. Searchable document libraries streamline retrieval and management.



"It's easy to see how remote network access could generate one to two hours each week in additional billable work. At an average of \$250 per hour for each of the 12 attorneys, the annual impact is over \$250,000."

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Frazer, Ryan, Goldberg, Arnold & Gittler (FRGAG), a small law firm located in Phoenix, Arizona, currently employs 28 employees. The firm's previous network infrastructure consisted of Microsoft® Small Business Server version 4.5, with workstations running the Microsoft Windows® 2000 Professional and Windows XP Professional operating systems. Client software included Microsoft Office 2000 and Office XP, Amicus, On Time, PCLaw and various other programs specific to the legal field.

Although the network environment at FRGAG was relatively stable and serviceable, the firm recognized the tremendous opportunity to improve the processes in place by using some of the newly available tools included with Microsoft Office Professional Edition 2003 and Microsoft Windows Small Business Server 2003 Premium Edition.

At the time, FRGAG was experiencing several challenges with its network infrastructure. Although none jeopardized the usual conducting of business, each represented a unique opportunity to improve the user experience, and

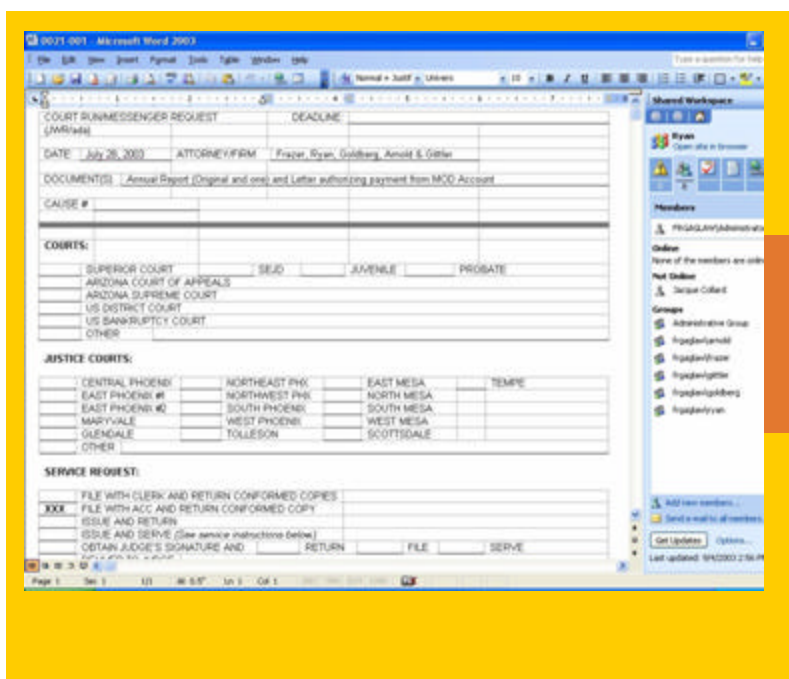
ultimately contribute to the bottom line through increased revenue or cost savings.

Lack of Communication Tool Integration

The first challenge that FRGAG faced was the lack of integration between its messaging tools and its client database. It resulted in double scheduling, wasted time setting up meetings, and the inability to link the client database with email. Many employees used the Microsoft Outlook 2000 messaging and collaboration client for e-mail, a third-party product named On Time for calendaring, scheduling, and task management. In addition, Amicus was the used to store client data. There was no integration between the three products. Since the Amicus client database was important to retain, the firm needed a single communications solution that would replace OnTime *and* integrate with its Amicus software.

Remote Access Difficult to Set Up and Maintain

The second area in which FRGAG



Document Workspaces enable lawyer teams to access and share files directly from Office 2003 programs. This saves time and helps generate more billable hours.

experienced challenges was with remote network access. FRGAG users had remote access through one of two means: Outlook Web Access or a virtual private network (VPN). Because FRGAG's architecture was based on Microsoft Exchange Server version 5.5, Outlook Web Access lacked certain key features that FRGAG considered important, such as support for signatures, spell checking, and so on. Although Outlook Web Access was functional, it was less than ideal.

As for the VPN technology that was in place, it was just the Remote Access Service (RAS) that was included with the Microsoft Windows NT® operating system version 4.0. Because of the complexities involved in setting up remote VPN connections, FRGAG had to incur the extra expense of dispatching an outside IT resource to *each* location where an employee wanted to have VPN connection capability. Also, that VPN solution was somewhat complex and hard to manage, making it a service that was only utilized by the most technically savvy employees.

Inefficient Information Storage and Retrieval

All documentation produced at the law firm was stored in a standard Windows-based file structure and organized by client number. Within each client number was a standard set of folders created to hold various types of documentation (letters/correspondence, estate documents, etc.). Finding information in this system of filing had proved to be very efficient when users knew the client number. However, trying to find information without the client number was a significant challenge. Frequently, when creating a new document for a client, employees wanted to reference a similar document created recently for another client. If they could not remember the client number, they were unable to find that other document. Employees needed to be able to catalog and store their

information according to any number of attributes, so as to make searching painless.

Additionally, FRGAG was divided into six profit centers, each with its own team of attorneys and support staff. These individual teams collaborated heavily on client matters, but this collaboration was largely manual, creating inefficiencies in document production. The firm could benefit from having a richer information storage and retrieval environment that not only supported full search capabilities using various document properties, but also enhanced collaboration among team members and the documents being produced.

FRGAG's solution began by seeking the technical expertise of itSynergy, a Microsoft partner. The consultant recommended upgrades to the infrastructure, both at the server level and on the desktop. The server was replaced with new hardware running Windows Small Business Server 2003 Premium Edition with Microsoft SQL Server™. In addition, all the desktops were upgraded to Windows XP Professional and Microsoft Office Professional Edition 2003.

After the infrastructure upgrades were complete, several new features were in place immediately, such as the Remote Web Workplace (included in Small Business Server 2003). This page became the starting point for FRGAG employees utilizing the new and improved remote access. From this page, employees can access internal Windows SharePoint Services sites, Outlook Web Access, and even their own desktop. Advanced users can also download the configuration settings for a VPN connection.

After the infrastructure upgrades, several custom-developed solutions were implemented in order to address other challenges that the law firm faced. The first

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Michael Cocanower
President
itSynergy



solution was the deployment of custom Windows SharePoint Services sites. There are six profit centers within the company. The first is a companywide site, and each of the remaining five has its own intranet site for collaboration among team members. Additionally, Windows SharePoint Services became the new primary engine used for document storage, management, and searching.

Next, Microsoft Office Outlook 2003 was deployed to all desktops as the single solution for messaging and collaboration. In order to make the transition successful, custom print templates were created to match the output of the previous On Time system software. Outlook 2003 also integrated well with the Amicus client database.

Benefits

Each of the four primary areas of the solution addresses a specific business need and directly affects FRGAG's bottom line.

Integration of Communication Tools Generates More Billable Time

In the areas of document retrieval and team collaboration, the solution has a direct affect on saving time for billable employees. If an employee can quickly find a document or reference a previously created document, significant time savings will be realized. In addition, by being able to collaborate in an online environment, employees can work more efficiently and produce more in the same amount of time. By replacing its old On Time calendaring program with Outlook 2003, the firm saw dramatic time savings delivered by the new junk mail filters, a novel approach to conference room management, and new message management features.

"Outlook 2003 replaced On Time, our specialized scheduling and task software,"

says James W. Ryan, Managing Partner. "We now have all the communication tools in one spot: e-mail, calendaring, tasks, and instant messaging. The potential productivity gain is enormous and has to be worth another \$15,000 to \$20,000 per month to us in additional billable time across the entire firm."

"We estimate the new junk mail filter in Outlook alone saves our firm's 28 employees at least \$10,000 per month in time," continues Ryan. "It has virtually eliminated this irksome time-waster and given us the ability to do more billable work."

The firm also found a unique way to manage conference room scheduling. The firm's technology partner, itSynergy, set up the conference rooms as resource mailboxes that automatically schedule themselves when meeting requests are generated.

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Simple Setup and Network Management Saves Over \$350,000

Having full, secure, remote access to its network was extremely important to the law firm. Such access allows billable personnel, wherever they may be, to finish up paperwork that needs completion, handle client e-mail around the clock, and provide management with a way to remain productive.

"I was able to rapidly respond to a client at 6 A.M. with e-mail from home," says Ryan. "He was impressed that I could



solve his problem so quickly, regardless of the fact I was in my pajamas.”

If VPN access has generated impressive reactions from clients, the anticipated affect on billable work for the firm’s partners is just as impressive. “It’s easy to see how remote network access could generate one to two hours each week in additional billable work,” says Ryan. “At an average of \$250 per hour for each of the 12 attorneys, the annual impact is over \$300,000.”

Ease of deployment for the new software was critical to the firm and any downtime impacted billable hours and client workloads. Therefore, the ability to complete the installation during a weekend was important.

“The potential cost of *not* having full access to our entire network for the week following installation was \$50,000 in lost billable time and the loss of a highly valued client,” says Ryan. “The software deployment was near-perfect. We never missed a beat.”

In addition, powerful new network management features in Windows Small Business Server benefit both the customer and the IT partner. Both network problems and regular maintenance can be done without an onsite service call.

“Via Small Business Server 2003, we now have the ability to solve problems all the way down to the desktop PC level,” says Michael Cocanower, itSynergy president. “It means that we’re solving most problems remotely and that our customer doesn’t have to wait for a technician to arrive on site.”

Shared Document Site Accelerates Document Production

FRGAG’s Windows SharePoint Services site is divided into six subsites. The main

site is for overall company use and houses a large shared document library, vacation calendar, network trouble ticket alert system, announcements, and events. Special training resources are also announced, such as the Web training available for the new features and functionality of Office Professional Edition 2003.

Each of the six profit centers in the firm has its own document library on the Windows SharePoint Services 2003 site. FRGAG’s paralegal and secretarial staff immediately saw the benefit of robust version control for the firm’s documents. All Microsoft Office Word documents utilize powerful version-control capabilities, which virtually eliminate miscommunication and errors. The SharePoint Services site automatically saves the previous version of a document.

“What’s the value of *not* messing up a client’s legal work?” asks Ryan. “Priceless, especially when just one malpractice law suit can potentially cost you millions.”

Searchable Document Library Streamlines Document Retrieval and Management

Utilizing the power of Windows Small Business Server 2003 with SQL Server and Windows SharePoint Services 2003, the firm has made its 15 gigabytes of documents full-text searchable directly from Word 2003. The retrieval of information is significantly accelerated and simplified. “Though we are just implementing this robust search capability, we estimate the productivity boost coming from easier access to be a minimum of 15 percent,” says Ryan. “Rapid access to documents is a key element in enhanced productivity for each of the production personnel in our firm.”

Microsoft Office is the business world's chosen environment for information work that provides the software, servers, and services that help you succeed by transforming information into impact.

For more information about Microsoft Office System, go to: <http://www.microsoft.com/office/>



Software and Services

Microsoft® Windows® XP Professional
Microsoft Office System:

Office Professional Edition 2003

- Microsoft® Office Word 2003
- Microsoft® Office Excel 2003
- Microsoft® Office Outlook® 2003
- Microsoft® Office Access 2003

Microsoft Windows Server System™:

- Microsoft® Windows Small Business Server 2003

Hardware

Dell PowerEdge 1600 SC

Dual 2.4 Ghz Xeon Processors 1GB RAM

3-36GB SCSI Drives, RAID 5 (approx 70GB useable space)

DLTVS80 Tape Backup

Partner

itSynergy

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For more information about itSynergy products and services, call (602) 297-2400, or visit the Web site at: <http://www.itsynergy.com/>

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