

Holland & Knight

Law Firm Automates Complex Workflows, Streamlining Processes and Development

Overview

Country or Region: United States

Industry: Professional services—Legal

Customer Profile

With 1,100 attorneys, 150 practice areas, and 23 offices worldwide, Holland & Knight is one of the country's largest law firms. Headquartered in Tampa, Florida, the firm provides legal services in almost all areas of the law.

Business Situation

To improve efficiency throughout the firm, Holland & Knight needed to eliminate time-consuming, paper-based processes, and it needed to do this without investing significant development time.

Solution

Holland & Knight implemented Nintex Workflow 2007, based on Microsoft® Office SharePoint® Server 2007. With minimal development, the firm has automated many business processes and upped efficiency enterprisewide.

Benefits

- Streamlined business processes
- Reduced paperwork, faster approvals
- Better business insight
- Workflow development time savings of 80 percent

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Malay Shah, IT Web Manager, Holland & Knight

Holland & Knight has 1,100 attorneys across the globe. To maximize efficiency and lower operating costs, the law firm needed to automate paper-based processes, but to create a solution in-house would have required a monumental development effort. Instead, the firm deployed Nintex Workflow 2007, an application based on Microsoft® Office SharePoint® Server 2007, and implemented automated workflows to handle vacation requests, budgeting, expense requisitions, and project initiation. Now, these processes are conducted in a paperless fashion, much faster than before. Also, by using the solution's powerful reporting capabilities, users can see the status of items in a workflow in real time. Not least of all, the firm saved significant development time. IT staff estimate that to implement a workflow application, the Nintex Workflow 2007 solution reduced development time from one week to less than one day.

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Situation

Holland & Knight serves a global client base from 23 offices in the United States, Asia, and South America. With 1,100 attorneys, the firm can provide client-focused services and direct multijurisdictional transactions from anywhere in the world. Holland & Knight also is one of the largest law firms in the United States.

For years, the firm struggled with labor- and paper-intensive processes that required copious amounts of time from busy employees. For instance, budgeting within the IT department required a dedicated accountant who worked with each IT manager to gather budget information into a series of Microsoft® Office Excel® spreadsheets. This information was then consolidated into a single spreadsheet and reconciled against the company's general ledger, and finally, it was entered into its ELITE financial management system. “It was difficult and time consuming,” says Clint Van Winkle, IT Operations Manager at Holland & Knight. If there was a need to reforecast the budget, the accountant had to manually sort through the spreadsheets, revise entries, rectify information against the general ledger, and send revised budget information to Finance so they could enter the new data into ELITE. “Our ability to share information among systems was limited, and it was a paper-intensive process, so we couldn't easily revise budgets in midstream.”

To submit a vacation request, an employee had to fill out a paper form, which was then routed among managers for approvals, and then sent to the human resources (HR) department to verify the request against the employee's remaining vacation days. “It could take several business days to get the piece of paper from point A to point B,” says Malay Shah, IT Web Manager at Holland & Knight. If an approver was out of the office, the request

could be delayed as the paper sat on a desk or in an interoffice mailbox.

The firm wanted to automate these processes, but—despite having in-house development expertise in the Microsoft Visual C#® programming language and ASP.NET (part of the Microsoft .NET Framework)—it didn't seem a good use of its time. “We knew that it would take our developers weeks to create the complex workflows we needed,” says Shah.

In an uncertain economic environment, Holland & Knight prioritized optimizing business processes, to boost efficiency and minimize waste. “We had an internal initiative to reduce our paper-based processes,” explains Shah, “It was a cost-savings initiative for sure, but it was also about saving time for all of our employees so they could focus on more meaningful work.”

Solution

In 2006, Holland & Knight adopted Microsoft Office SharePoint® Server 2007 for its enterprise search capabilities, which were needed to help people find information within its intranet and public site.

This was also the genesis of a broader usage of SharePoint sites at Holland & Knight. The company began to use the system for communication and collaboration within and among departments and practice groups. For example, the firm's Syndication department uses Office SharePoint Server 2007 to publish news and events and to facilitate discussions among attorneys. “Again, Office SharePoint Server 2007 delivered great efficiencies. It significantly compressed development and administration time because with it, all of our intranet sites are based on the same centralized tools and uniform code,” explains Shah. The firm is currently in the process of migrating all

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Holland & Knight intranet sites to Office SharePoint Server 2007.

The IT department had also started to use the built-in workflow capabilities of Office SharePoint Server 2007 to streamline some of its own business processes. “We had success in doing simple customizations to the out-of-the-box workflow in Office SharePoint Server 2007,” says Shah. “But there were other processes that required more complex workflow and, therefore, a bigger development effort.”

While attending an Office SharePoint Server 2007 user conference, Shah and Van Winkle discovered Nintex Workflow 2007 from Nintex, a solution that enables companies that use Office SharePoint Server 2007 to build complex workflows using a graphical Web browser interface. Nintex, a Microsoft Gold Certified Partner, is a leading innovator of software products that extend Microsoft SharePoint technologies. The company’s solutions are used by more than 1,000 customers in 60 countries.

Holland & Knight evaluated Nintex Workflow 2007 as well as solutions from several other vendors—including ones that were based on Office SharePoint Server 2007 and ones that were not. Says Shah, “Most other products were more costly. We were impressed with the Nintex Workflow 2007 solution and thought that it would be a great fit because of our strong knowledge of SharePoint products and technologies, and because we had committed to Office SharePoint Server 2007 as the foundation for our collaboration and business process management environment.”

In early 2008, Holland & Knight deployed Nintex Workflow 2007 Enterprise Edition. The solution is licensed on a per-server basis and is installed on the company’s existing Office SharePoint Server 2007-based servers, so

Holland and Knight did not have to invest in additional hardware or calculate client access license numbers. “The actual deployment took less than a week,” says Shah. Once the software was installed, the IT department used the system’s graphical Web interface to customize complex workflows for different business processes. “The tools are very simple to use.”

Requests for IT budget information are now automatically routed to departmental managers, who enter data into Web-based forms enabled by InfoPath® Forms Services in Office SharePoint Server 2007. The completed forms initiate an approval process, in which the information is routed back to the IT department’s accountant, who can access the consolidated information from a centralized location within Office SharePoint Server 2007. Budget requests, spending limit approvals, and departmental budgets can all be modified during the approval process. Further, Nintex Workflow 2007 Enterprise Edition enables Holland & Knight to use the Business Data Catalog feature in Office SharePoint Server 2007 to query and integrate financial information from its ELITE financial system, and from its Microsoft SQL Server® data management software, into the workflow process. Reporting capabilities in Microsoft SQL Server Reporting Services give users real-time insight into budget approval bottlenecks, budget figures, spending levels, and more. SQL Server Reporting Services also makes it possible for the accountants to easily output information into Office Excel spreadsheets for easy sharing with the Finance department.

Vacation requests also are now entered into a Web-based form within Office SharePoint Server 2007. The workflow triggers alerts through e-mail or instant messaging that notify managers that their attention is required. Managers who are out of the office or without access to the corporate network

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and the Office SharePoint Server 2007 environment can use Nintex LazyApproval functionality to approve requests through e-mail, instant messaging, or a text message. Through the Business Data Catalog, the workflow sends queries to the company's Ceridian-based HR system for managing vacation time so that requests can be automatically verified against each employee's bank of available vacation hours. Finally, once the request is approved, the vacation time is entered into a shared calendar on a departmental SharePoint site.

Expense requisitions are handled similarly through Nintex Workflow 2007. This speeds the process for approving or denying capital expenditures because the information is centrally located within Office SharePoint Server 2007, and because the Nintex LazyApproval mechanism enables rapid approval from any location.

To date, Holland & Knight's IT department has automated four key processes, including budgeting; vacation requests; expense requisitions; and project initiation. The company plans to implement workflow for document destruction and litigation processes in 2010.

Benefits

Using Nintex Workflow 2007 along with Microsoft Office SharePoint Server 2007, Holland & Knight has streamlined its business processes, improved reporting, and easily implemented complex workflows that otherwise would have required time-intensive development efforts. It has also made significant progress toward achieving a paperless environment.

Streamlined Business Processes

Holland & Knight has used Nintex Workflow 2007 to transform time-consuming, paper-based processes into automated workflows.

“Our Office SharePoint Server 2007 environment and Nintex Workflow 2007 have helped us streamline processes many times over,” says Van Winkle. For example, the IT department has simplified budgeting processes by using online forms to gather information into a central location, with automated reminders and alerts to ensure that information is provided in a timely manner. Transferring figures among the general ledger is also easier. “Now, the accountant can add or subtract amounts from a given category directly within Office SharePoint Server 2007 instead of having to open and sort through information in numerous Office Excel spreadsheets.”

Reduced Paperwork, Faster Approvals

The automated workflow solution is helping the firm make progress toward a paperless environment. “With more and more of our forms and approvals online, we've reduced our reliance on paper-based signatures. It's a great reduction in paper consumption, and it also saves time,” says Shah.

“When we first began to look into workflow solutions, we spoke to a reseller who claimed that it costs an organization approximately U.S.\$165 to handle each paper-based invoice,” adds Van Winkle. “This seemed plausible, and it's definitely one of the reasons we wanted to implement workflow. But just as important was the fact that paper is a liability when it comes to ensuring timely approvals. If someone is out of the office, the paper just sits. With Nintex LazyApproval, requests can be answered almost immediately.” The LazyApproval mechanism enables managers to approve or deny capital expenditures and vacation requests through e-mail and on mobile devices. “Now, people don't have to wait to find out whether expense requests are approved or not. This has enabled us to make decisions faster and keep business moving forward,” he explains.

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Better Business Insight

Holland & Knight estimates that the time it takes for a vacation request to be granted has been reduced from up to 3 days to an average of 15 minutes or less. “This helps us immensely with resource planning in IT,” says Shah. Users can now see, within a shared calendar on a SharePoint site, which employees will be on leave and when. “We can base our project calendars off the true availability of resources. It’s a much more efficient way to operate.”

Because Nintex Workflow 2007 integrates with the inherent reporting capabilities of Office SharePoint Server 2007, users can see exactly where an item is within a workflow process. From a management perspective, this reporting capability gives great insight into individual and group performance by showing which business processes have gone over their anticipated duration, who the owner is, and what the roadblocks might be.

Integration of SQL Server Reporting Services streamlines finance activities, and gives users real-time insight into detailed budget information. “Sharing information among departmental budgets, the general ledger, and the ELITE financial system used to be very involved and time consuming. With Nintex Workflow 2007 and SQL Server Reporting Services, accountants can export budget information easily, to share with the Finance department,” says Van Winkle.

Workflow Development Time Savings of 80 Percent

Holland & Knight has realized significant development time-savings with Office SharePoint Server 2007. As relates to the intranet, Shah says, “Without Office SharePoint Server 2007, we would need to double our development staff to keep up with the demand for new collaboration sites.”

For workflow development, with Nintex Workflow 2007, Holland & Knight has enabled staff to design and implement complex workflows in a graphical, code-free environment. “For a developer to create a workflow application in our old environment could take a week or more. Now, with Office SharePoint Server 2007 and the Nintex solution we can implement workflows in less than a day.” says Shah.

The deep integration of Nintex Workflow 2007 with Office SharePoint Server 2007 not only reduces development time, but also streamlines testing for Holland & Knight. “All of the authentication and authorization is built in, because Nintex Workflow 2007 takes advantage of the existing Office SharePoint Server 2007 environment. We’re working within a proven and familiar environment,” says Shah.

The investment in Office SharePoint Server 2007 and Nintex Workflow 2007 is viewed as a broader strategy for driving cost-savings companywide. “Once we created the first budgeting workflow and started to use it within the IT department, we realized how powerful the Office SharePoint Server 2007-based solution is,” says Van Winkle. “We can easily repurpose workflows for use in other departments and realize efficiency gains almost immediately.”

For More Information

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For more information about Nintex products and services, call (425) 452-3818 or visit the Web site at:

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