

FLG FERNALD LAW GROUP LLP

Organization Size: 10+ employees
Vertical Industries: Legal Services
Country/Region: United States

Organization Profile

Fernald Law Group is a growing law firm in Southern California providing a wide range of legal services to its clients.

Business Situation

To more effectively compete with larger law firms, Fernald Law Group chose Microsoft's hosted SharePoint offering (BPOS) for document and matter management. However, the firm wanted to ensure easy email integration and offline access.

Solution

Fernald Law Group deployed Colligo Contributor Pro for effective email management, integration to other IT systems and offline access.

Benefits

- Improved collaboration among legal staff
- Increased findability of emails and documents
- Enabled offline access to SharePoint

Software and Services

- Microsoft SharePoint Online (BPOS)
- Colligo Contributor Pro

Fernald Law Group Creates Competitive Advantage with Microsoft-Hosted SharePoint & Colligo Contributor Pro

“Our goal of a paperless office has really benefited from Colligo Contributor Pro. Colligo’s integration of Windows Explorer to SharePoint enables us to save files directly to SharePoint and add the necessary metadata to make them easier to organize and find.”

Brandon Fernald, Principal, Fernald Law Group

Fernald Law Group (FLG) is a growing law firm in Southern California that provides a wide range of legal services. Aiming to become a paperless office, manage costs, and gain competitive edge, Fernald Law Group chose Microsoft SharePoint as the foundation of its document management system. To increase the functionality of SharePoint, Fernald also deployed Colligo Contributor Pro. This easy-to-use system allows lawyers and staff to move, save, and manage emails from Outlook to SharePoint, and to easily access these documents, without an Internet connection.

About Fernald Law Group

Brandon C. Fernald and Rachel D. Stanger formed Fernald Law Group LLP in 2009. Both principals graduated from highly regarded law schools, and, combined, have more than twenty years of experience working on complex litigation matters at top national law firms. The firm leverages the latest technology, such as cloud computing, to provide the highest quality of legal representation to its clients.

Application

Fernald Law Group’s lawyers and administrative staff use Colligo Contributor Pro to support email and matter management in Microsoft Business Productivity Online Services (BPOS), to save documents directly to SharePoint from their native applications, and to provide offline access to content stored in SharePoint.

Business Challenge

When the principals of Fernald Law Group decided to start their own firm, they established a number of goals to set themselves apart from competitors. They aimed to store client and administrative files using a completely paperless system, and to leverage the latest technology in order to provide the same high quality of legal representation as larger firms. They also wanted to build an IT infrastructure that was cost effective and easy to manage, and pass the savings on to their clients.

“Coming from a large firm background, I was used to expensive internal software applications and experienced IT resources, but I knew I wouldn’t have access to either when I started my own firm,” says Brandon Fernald, a principal at Fernald Law Group. “My old firm used Interwoven’s FileSite application hosted on internal servers for document management. I wanted my firm to have the same level of document and matter management capabilities that I was used to with FileSite, but I wanted to do it in the cloud, so I wouldn’t have to support an internal IT infrastructure.”

“Our ability to effectively collaborate on cases and manage the firm has improved dramatically.”

Brandon Fernald,
Principal,
Fernald Law Group

Microsoft’s BPOS for SharePoint provided a cost-effective solution, but did not offer the Outlook integration that Fernald found useful in FileSite. In particular, the Fernald Law Group attorneys and staff needed the ability to “drag and drop” emails directly from Outlook into SharePoint and access client files instantly, without an Internet connection.

Solution: Colligo Contributor Pro

After researching these requirements, Fernald began evaluating Colligo Contributor Pro and quickly found it to be the most cost-effective solution for integrating SharePoint with Outlook and Windows Explorer. Colligo also provided offline SharePoint caching capability, allowing the firm to access client files while not connected to the Internet. He passed the solution on to his fellow lawyers, who quickly agreed.

“We have received very positive feedback on the Microsoft BPOS and Colligo combination,” says Fernald.

Using SharePoint, the FLG team organized files by client and case, and built a library based on a standardized template. With Colligo Contributor, this document library was then connected to lawyers’ Outlook email folders. The team could then easily “drag-and-drop” relevant emails into the appropriate folder, and quickly retrieve documentation as needed.

“Our goal of a paperless office has really benefited from Colligo Contributor Pro. Colligo Contributor Pro’s integration of Windows Explorer to SharePoint enables us to save files directly from Acrobat to our connected SharePoint folders and also provides the ability to add the necessary metadata to the files to make them easier to organize and find,” said Fernald.

The Fernald team also appreciates the automatic syncing of all SharePoint files to laptop computers, backing up essential documents and files to numerous computers. All files are also accessible without Internet access, which comes in handy when visiting clients on-site.

“Since all our client matter and administration files are centrally stored and accessible to all of our staff, our ability to effectively collaborate on cases and manage the firm has improved dramatically,” concluded Fernald.

Combining SharePoint and Colligo tools led to the successful realization of a paperless, high quality, and cost-effective file management system that is also secure and easy-to-use.

Results

Deploying Colligo Contributor Pro and Microsoft BPOS has enabled the Fernald Law Group to:

- Cost-effectively replicate and surpass the functionality of Interwoven FileSite
- Improve collaboration and knowledge sharing among staff
- Instantly access client matter and administration files, even offline
- Utilize “drag-and-drop” and “Send & File” functionality for moving emails to SharePoint
- Automatically capture email and document metadata for quick retrieval
- Access matter files stored in SharePoint via the Outlook interface
- Save files directly to SharePoint from their native application

Next Steps

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