



PayneGroup

CASE STUDIES

Summit Law Group Partners with PayneGroup to Combat Metadata Challenge

Highlights

- Goal** Find Metadata software that would work seamlessly and without intense technical support and setup, as well as aligning with a vendor that would partner with the firm on providing necessary user training and most importantly be open to user feedback on feature/function requests for future versions.
- Solution** Metadata Assistant 3.0

Summit Law Group (SLG) is a 30 attorney, 60 employee law firm based in Seattle, Washington. Since its beginnings, SLG has been focused on designing a modern law firm founded on a single principle: customer service. SLG's leadership believes that the market for legal services has dramatically changed in the last decade, and it has become critical to think creatively and proactively in formulating the most effective and efficient solutions to solve clients' legal needs. With that said, every person at Summit Law Group is a legal professional who shares in the firm's success, and all lawyers are equity owners. As a result, each member of the SLG team personally feels a sense of ownership, responsibility and accountability to firm clients.

This focus on service is also keenly evident within the Information Technology area. Stu Harris, SLG's IT Manager, has spent the last 12 years single-handedly managing the firm's IT Department. In addition to handling all day-to-day IT issues, software installs upgrades, and general technology troubleshooting, he is also heavily involved in user training and making sure his attorneys are getting access to the technology tools they need to better serve clients and are able to effectively use the given technology at their disposal. A key factor to running a successful IT operation as a one man show is finding and realizing efficiencies (i.e., defining workflows and increasing productivity), and relying on superior customer service provided by vendors (i.e., utilizing vendors who provide solid applications, fast and reliable technical support and troubleshooting based on understanding client needs and timelines).

Customer Profile

SUMMIT LAW GROUP

Headquarters Seattle, WA

Industry Legal

Metadata Challenge

Less than a year ago, SLG, led by Stu Harris, looked for alternatives

Employees

30 attorney,
60 employee

→ Metadata Assistant 3.0 users have an option when it comes to which documents they need to clean, convert to PDF, or if they do not want to process them at all.

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to its existing metadata management software application. The firm had been using WorkShare but had encountered several product support issues as well as some inconsistencies in the metadata product. When it came time to look for another solution, Stu talked with other law firms about what they were using for their metadata solution, and was told by many of them to look into PayneGroup's Metadata Assistant. SLG's key goals in selecting a new metadata tool included finding software that would work seamlessly and without intense technical support and setup, as well as aligning with a vendor that would partner with the firm on providing necessary user training and most importantly be open to user feedback on feature/function requests for future versions. In selecting a metadata tool, SLG wanted to make sure that all data was being properly cleaned, seamless to the user, with no hidden surprises. Since the firm maintains no set policies around metadata, the selected software would have to provide the 'best practice' options by guiding users to follow the proper workflow procedures. SLG selected Metadata Assistant in early 2009 and has been very impressed with PayneGroup's stellar customer service and excellent support as well as the product's overall stability and minimal to no troubleshooting issues. Since initial installation, Stu has worked closely with PayneGroup on maximizing its use of this tool, resulting in the recent upgrade to the vendor's new 3.0 version.

Metadata Assistant 3: Why upgrade?

One of SLG's main reasons for being an 'early upgrade adopter' for Metadata Assistant 3.0 was based on PayneGroup's willingness and ability to incorporate a key SLG feature requirement into the 3.0 version. SLG wanted the ability to choose a unique cleaning process for each e-mail attachment versus having to apply a single process for all attachments. Now, based on the new feature set, Metadata Assistant 3.0 users have an option when it comes to which documents they need to clean, convert to PDF, or if they do not want to process them at all. An intuitive dialog box allows users to decide how they want to proceed with processing individual attachments.

Other benefits SLG has realized and hopes to capitalize on moving forward with Metadata Assistant 3.0 include:

- **Ease of use** – a new user interface has made it easier to read and navigate results windows as well as new help files
- **Increased speed and improved performance** – faster processing

(up to 60%) and the ability to launch multiple instances of the Metadata Assistant process without affecting performance

- **New Support section in the Help Files** - provides more 'self-help' troubleshooting options and solutions to common technical support issues
- **New e-mail integration** – improved options that take the guess work out of streamlining the send/clean process
- **Configurable cleaning process** – new ways to select a different cleaning process for each attachment in embedded e-mail messages
- **Improved file handling** – better handling of Microsoft Office files stored in .zip attachments, Outlook messages with embedded e-mails, and new detection and cleaning of .pdf files.