

## Passing the audition:

Worldox survives a tough test, succeeds where other DMS programs failed.



### **Challenge:**

*To integrate with Juris and other essential programs and work with custom tracking codes ... to move towards the elusive, "paperless law firm" goal.*

### **Solution:**

*Worldox chosen after extensive due diligence, evaluated in a rigorous "proof-of-concept" test, then finally installed and rolled out to users.*

### **Result:**

*Less paper, simplified workflows, dramatic improvements in how we manage and circulate client and internal documents, a high level of attorney satisfaction*

---

*"Worldox enabled ... customization seamlessly."*

---

**By S. William Provensal**

November 17, 2009

Chief Operating Officer, Baldwin Haspel Burke & Mayer, LLC

I didn't know much about Worldox until earlier this year, but I certainly was familiar with Document Management Systems (DMS). In fact, we were on our second DMS implementation – an effort which so far had not been satisfactory. We did exhaustive due diligence, but the former product was not functioning consistent with our expectations.

### **Time for a change**

We knew we had another round of (expensive) custom programming to rectify the situation, or we'd have to try something new. So I was very interested when Frank Jones (Legal Software Connection, Inc.) suggested Worldox – even more interested after the demonstration.

### **A step past due diligence**

Worldox looked to be exactly the kind of solution we needed. But how do you prove that a system works? First we developed an 18-point questionnaire and spoke with 12 similar firms using Worldox. All were not just pleased, but *elated* with this product. So far, so good. That response led to a trial run, a live, "proof-of-concept" test on site:

*We converted our data, installed a test copy of Worldox and trained test users/evaluators – all in only three days. After two more days spent in structured testing, it was obvious that Worldox features did indeed match our needs. Some tweaking might be needed, but Worldox was just as powerful and useful as the other firms had claimed.*

A week later, Worldox was rolled out and training completed. And that first day, our people were up and running on Worldox.

### **Why Worldox was the right choice**

We needed tight integration with Juris, also with WordPerfect, Microsoft Word, Excel, Outlook and other applications. Ultimately, our goal is to be as paperless as possible, to simplify work flows firm-wide. These capabilities and efficiencies were only promised by the other DMS software we tried. Worldox actually delivers on that promise.

**Baldwin Haspel Burke  
& Mayer, LLC**

---

*“How do you prove a system works?”*

*We converted test data, installed Worldox and trained evaluators – all in three days time. After two more days spent in structured testing, it was obvious that ... Worldox was just as powerful and useful as the other firms had described.”*

---

---

*“Worldox has turned our store of documents into a true ‘knowledge base’.”*

---

We had another critical requirement, the need to integrate a 5-digit tracking number used in our call & copy operation. Those numbers had to link to *Client/Matter* codes. Worldox enabled that customization seamlessly. Tracking codes are now uploaded and linked hourly, automatically, from our accounting systems. This one change alone makes a huge difference here in document-handling efficiency.

***The benefits***

Where to start? First of all, there are no more lost or missing documents. Add to that an office-wide, sharable document system – a flexible database. Our Federal Court PDF filing concerns have been laid to rest ... ethical walls and full security enhanced. We have in effect gained an intranet without the creation of cumbersome systems. Soon we’ll even be using Worldox Web/Mobile to create extranet client sites.

And it’s not just for client documents. Administrators can now share internal files in secure yet flexible ways. We no longer have different versions of important documents, no multiple or incomplete copies floating around. It’s safer too. Uploading files to different firm sites (401k plan admin and disaster recovery, for example) is so much easier than it used to be.

***The bottom line:***

We are making strides towards that elusive, “paperless office” goal. In the meantime, Worldox has turned our store of documents into a true “knowledge base.” This searchable repository offers new access and efficiencies to our attorneys and staff, so it’s far easier for us to provide custom solutions to client problems.

Without exception, our attorneys are extremely pleased with Worldox. This high level of attorney satisfaction is the true measure of how successful Worldox is for us.