

Lombardo & Gilles implements Worldox® to manage documents and email, and streamline workflow.



Lombardo & Gilles, LLP

Challenge:

To cope with the growing burden of document and email management, and move towards the goal of paperless operation.

Solution:

Worldox installed; staff oriented and trained.

Result:

We are saving time and money, on the road to going paperless, realizing not only cost benefits, but green benefits.

"Worldox has exceeded my expectations, especially from a support standpoint."

By Jeff Gilles

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Background

Law firms have an unparalleled amount of information to manage and track, and as any law professional knows, efficiently handling the volume of documents is one of the most challenging tasks involved in managing a law firm. With more than 15 years of documents accumulated on our server, that task was becoming even more cumbersome for my law firm, *Lombardo & Gilles*, based in Salinas, Calif.

We started looking for a new document management system (DMS) to create a more paperless office, and also to modernize our firm's email management system, which was costly, paper-intensive and time-consuming. The attorneys and staff had exhausted the capabilities of Microsoft Outlook to search for and organize emails, and we determined that Microsoft search and coding alone could no longer provide an adequate resource for our requirements.

The Solution: Worldox

We looked at a few different solutions, including Hummingbird (now Open Text), prior to choosing Worldox. In addition to the DMS coming highly recommended by our IT services provider – *Baker + Cadence Solutions*, a leading Worldox systems integrator – one of our lawyers had used a system at his previous law firm which he said was quite similar to Worldox. Our research proved that Worldox was the most efficient and competitive product available.

The Worldox installation was extremely smooth, the whole process only taking a few days. *Baker + Cadence* CEO Bill Baker spearheaded work-study programs with our staff and attorneys to make sure they understood the way the system worked. Using real-time examples, Bill gave my staff the opportunity to ask questions as he demonstrated and showed them how to use the product. He then came back and did one-on-one training with each staff member.

**Lombardo & Gilles,
LLP**

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Tangible Benefits

There are many benefits to using Worldox. My favorite feature of Worldox is the real-time tracking of, and ability to centrally store, email. Now, all the attorneys working on my cases have access to the emails I have saved to Worldox, and everything is accessible from a central location.

I was not the only person to see the benefits of Worldox. Our firm’s office manager, Tina Hamby quickly saw that Worldox was going to completely change the way we conducted business.

According to Tina, “One of the attorneys spent hours trying to find three documents he had created, and when he couldn’t, he had to recreate them. Using Worldox, we were able to find those documents in two seconds. That’s when I was sold on Worldox.”

With the help of Worldox, our office is gradually going paperless. Before Worldox, our secretaries were spending lots of time copying and emailing documents. Now with Worldox, not only do we save man hours, but we save paper and toner, which is not only a cost benefit, but a green benefit as well.

Worldox has exceeded my expectations, especially from a support standpoint. With many companies it takes forever to get a support technician on the phone. Worldox isn’t that way; they are quick to respond. Worldox is a solution-driven company and there is always someone to help us with any problem we have. The few problems we have had have been dealt with in an efficient and prompt manner.

Worldox provides my firm with a wealth of benefits. Not only does it help us stay organized, efficient and relieve the stress of trying to find documents, but it also helps us stay green. Spending time and money scanning, sending and searching for documents is a practice of the past for our firm now. Worldox is the document management system of today, and our firm is greatly modernized because we have implemented this technology.