

Innovative Firm Culhane Meadows Leverages Worldox Cloud Technology for Greater Efficiency

Challenge:

To deliver exceptional legal services and leverage emerging technology without the need for a larger staff or expensive infrastructure so the firm could pass this cost savings along to its clients.

Solution:

Implemented Worldox Cloud so attorneys in different cities could access the firm's cloud-based documents whether they worked from home or small rental offices using their own PCs.

Result:

Worldox Cloud provides flexibility through multiple Cabinets with unique field structures, as well as security via ethical walls. Legacy documents are also easily integrated into Worldox.

By Rebecca Sattin, CIO at World Software Corporation and Heather Haughian, Founder & Managing Partner, Culhane Meadows – September 2016

Firm Profile

Culhane Meadows is proudly shaking up the legal marketplace by offering exceptional, yet highly-efficient and cost-effective, client services provided exclusively by partner-level attorneys with substantial experience from large law firms or in-house legal departments of respected corporations.

The Business Challenge

The law firm of Culhane Meadows was formed in 2013 when 16 attorneys in four cities split off from another larger firm to form their own new firm with a unique business model. They were committed to delivering legal services efficiently “by leveraging emerging technology, while avoiding the burden of extravagant office space, excessive support staff, fancy artwork on the walls, marble columns in the lobby or other expenses that add no value or benefit to the client.”

Heather Haughian, Founder and Managing Partner, had an engineering background and took on the responsibility of finding the technology and services to support this unique business model. Her goal was to find technology that would grow with the firm without requiring costly infrastructure or full time staff to maintain it. In order to meet this goal, she planned on finding Cloud solutions to manage documents, email and their accounting and billing needs.

The Solution

Haughian had to find a secure and robust document management system for their new law firm so that these services were ready to go on day one for their new partners. Because the plan was for attorneys at the firm to work from home offices or from small rental offices, she decided to choose cloud-based products to meet their needs. Each attorney would supply his or her own equipment, meeting the necessary requirements for the products.



Additional Benefits:

As the firm has grown and now employs 45 attorneys in seven different cities, the scalability and agile nature of the Worldox Cloud allowed this growth to proceed seamlessly without incurring additional costs when adding new attorneys or expanding into new markets.

Worldox Cloud fits in to the firm's agile business model and conforms with bandwidth requirements. It simplifies searches and enables attorneys to save emails and documents with ease and provides an extremely robust searching capability with a state of the art indexer.

Since the attorneys were spread out over four different cities and they would have no in-house IT services, it was important to Haughian that they have a system that was easy to use and require little support. For compliance reasons, she preferred a document management system that was "opt-out" rather than "opt-in," meaning that, by default, all documents would be saved into the system. Since each attorney supplied his or her own equipment, she wanted to ensure that work done for clients was always saved into the document management system.

Haughian chose Worldox Cloud as their document management system because she was looking for a cloud based system that afforded them the flexibility to set up multiple Cabinets with unique field structures that could be customized to her firm's needs. Also, the built-in ethical wall features were a necessity.

Affinity Consulting, a Worldox Inner Circle reseller, provided the initial training for the firm and continues to provide training as they grow.

As a result of Haughian's preparation, the firm was able to hit the ground running on their first day of operation. Even though it would take some time for their old firm to provide legacy documents for the clients who came with them, as those documents became available they were able to easily integrate them into the Worldox system.

Business Benefits

In just a few years, the firm has grown to include 45 attorneys in 7 cities. The scalability and agile nature of the Worldox Cloud allowed this growth to proceed seamlessly without incurring additional costs when adding new attorneys or expanding into a new market.



Future Plans:

Culhane Meadows plans to add more attorneys to their workforce. The firm continues to adapt to marketplace changes and uses Worldox Cloud to service their clients efficiently.

Their initial software choices allowed this growth to proceed seamlessly without incurring additional costs when opening new locations.

They upgraded to the GX4 version of Worldox Cloud in the second quarter of 2016 and have become even more enamored of the product. They appreciate the variety of ways that search results can be displayed. The text snippets are extremely helpful as are the indications of the number of instances of search terms in a given result.

With the new Follow Me Favorites feature, drop folders in Outlook are created automatically, saving attorneys time and allowing them to assimilate client emails into Worldox quickly and efficiently. The new version also made it easier to save over an existing document that had already been saved to Worldox and to change the name of a version on Save. Worldox Cloud support is very responsive and sets up new Ethical Walls at a moment's notice.

Future Plans

The firm continues to grow, adding 8 new attorneys in the last quarter of 2015. Their agile business model and use of Cloud technology has allowed them to expand and adapt to changes in the marketplace very quickly while still providing exceptional service to their clients. Culhane Meadows continues to evaluate and identify ways in which they can service their clients more efficiently. They aim to continue disrupting the legal industry in the interest of client service.

About Heather Clauson Haughian

Ms. Haughian is a Founder and Managing Partner of Culhane Meadows. She is an international attorney with experience from both sides of the pond who counsels global clients through complex technology transactions and intellectual property matters.

Ms. Haughian's practice is focused on complex technology and outsourcing transactions, data privacy and security-related issues as well as counseling involving the exploitation, leveraging, and transfer of intellectual property rights. Her experience is in the areas of information technology/software, insurance risk management platforms, biotechnology, financial services, transportation and logistics, and healthcare systems. She is a Certified Information Privacy Professional (US) through the



“Culhane Meadows prides itself on using cutting edge technology to provide it clients with high quality, efficient and cost-effective service and is always looking for innovative ways to increase the quality and efficiency of our client service. We chose Worldox Cloud as a foundation of our technology platform to provide our firm with a sophisticated, robust document management system that enhances our innovative firm’s ability to provide high quality services from anywhere in a secure, fully scalable and efficient cloud environment because Worldox had and continues to have an eye for innovation and constantly provides excellent customer service.”

*- Heather Clauson
Haughian, Founder &
Managing Partner*

International Association of Privacy Professionals (IAPP) and assists clients in connection with data breach response and mitigation activities.

Ms. Haughian has extensive experience in IT, transaction outsourcing, and large-scale software licensing deals with emphasis on SaaS business models and dealing with open source software issues. Ms. Haughian is also skilled in the areas of negotiating systems acquisitions, OEM and distribution transactions as well as performing due diligence on intellectual property portfolios and large technology platforms in the context of mergers and acquisitions. Ms. Haughian also regularly counsels her vendor clients on compliance with HIPAA/HITECH as a Business Associate processing and handling electronic protected health information (ePHI) and negotiates their business associate agreements.

