

Deeth Williams Wall: Enhancing Legal Practice Using Cutting-Edge Document Management

A MetaJure Case Study

Deeth Williams Wall is widely recognized as one of the top national Intellectual Property boutiques in Canada with international expertise in both Intellectual Property (IP) and Technology (IT) law. Modern technology is crucial to the success of the firm's 60 lawyers and staff.

"We have one of the most prominent cutting-edge tech practices in Canada. We serve clients of all sizes on IP rights and technology transactions, including litigation and prosecution. In fact, we've done technology transactions in every province," says Partner James Kosa, head of the firm's Internal Technology Committee.

"When you are known as a top tech firm, the technology we use to run the practice also has to be cutting-edge; it's essential to how we serve our clients. Additionally, we believe in providing flexibility for our lawyers to work remotely on a variety of devices, including laptops, tablets or other mobile devices. We need to be sure applications work everywhere securely."

Needed a system that didn't require attorneys to change behaviors

Historically, the firm used a directory structure file system to manage documents. "The system worked well to find things when you knew what you wanted, says James, "but we needed something that would do a better job for all our document storage and retrieval needs."

"[O]ur experience with IT management and services inside firms has taught us that users are often the problem. If they complied, tech systems would work fine. But lawyers and staff are human and often work in ways different from how an IT engineer thinks. We need systems that are tolerant of users' unique behaviors."

Partner James Kosa

"Over the years we've looked at other systems, but rejected them because they required users to change their behavior and many lawyers don't respond well to that. If there isn't good compliance, you won't achieve much success. Results will be incomplete or incorrect. With 25 lawyers, it would be reckless to invest in a Document Management System (DMS) that doesn't improve the quality of the legal services we provide to our clients."

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What appealed most to the firm about MetaJure?

"We liked MetaJure because it doesn't care how users conduct their work," says James. "Our users are pretty tech savvy but they vary in their use of technology, yet MetaJure's solution works for everyone. For example, a user who never looks for precedents wouldn't need a DMS in the traditional sense and to put that user through

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the additional hassle of manually entering all the particulars about every document or email is untenable. They wouldn't comply with the requirement of a traditional DMS and then

we wouldn't be able to find those materials in the future. With MetaJure, it doesn't matter. The materials they create are automatically available to others to use."

James adds that because emails often include non-client related content, using MetaJure to capture emails initially created some anxiety. "So we adopted an opt-in approach for email client folders. We've

found that's been a sound practice. And we're prepared to change the system if technology or dynamics in the firm change – we don't need to be rigid," he says.

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Much more than a simple solution

Beyond straight document management, the attorneys use MetaJure for conflict checks in addition to their regular process. "It's a very helpful secondary step. We have a lot of client data in our system and with MetaJure, we can get our hands on things that wouldn't even occur to lawyers using conventional methods. Picking up names of adverse parties that may be buried in documents is just one example," explains James.

"Second, MetaJure has helped us find precedents. For those who have diverse practices, it's particularly great. By and large we're able to find meaningful precedents in the first two pages of results and historically there hasn't been an easy way to find this information. For example, I work with telecom clients. Some of the forms of agreement are very specific and can be somewhat obscure. In fact, it's possible you'd only need to create a certain form of agreement once every 10 years. MetaJure allows me to find it so I don't need to start from scratch. That's very handy and also provides cost-savings to clients."

Overall, the firm's attorneys have embraced MetaJure. Says James, "The user interface is straight forward. It's fast and that's great. We like MetaJure in its current form and are excited about future versions that will do an even better job helping us make the most of our own intellectual property."

Deeth Williams Wall has been recognized as one of the top 10 IP Boutiques by Canadian Lawyer Magazine and their attorneys have been recognized as experts in IP and IT law in Canada and abroad. The firm was founded by lawyers who left partnerships in a big firm to start this boutique. Passionate about excellence, serving clients well and loving what they do, they believe that their job is to work on behalf of their clients and to adapt their business to fit clients' needs. These principles have guided their practice of law for twenty years.