



# FileTrail<sup>®</sup>

## GOVERNANCE

### Implement IG, Compliance and Cost Control with Confidence

Law firms have been slow to address the retention and destruction of physical records and electronic documents. Ironically, the path of least resistance — keeping everything just in case — is fraught with expense and risk. These include spiraling storage costs, data security risks, potential litigation, regulatory fines, and, most of all, risk to reputation.

The hesitation to act is understandable. Firms that have accumulated millions of documents over the last three decades, stored in multiple offsite storage facilities, often find it hard to know where to begin.

Manually reviewing each and every document would require a significant number of staff-hours. Further, most firms have no efficient way to identify all electronic records that are due for disposition, and continue to incur unnecessary storage costs.

#### Customer Profile

Ranking: A Global 10 / Am Law 10 firm

Attorneys: 1,100+

Connectors: iManage Work, file shares, LegalKEY

Implemented Governance in 2017

#### IMPORTANT ACCOMPLISHMENTS:

- » Governing documents and records.
- » Disposed of documents and records across a dozen offices worldwide

#### KEY INSIGHTS:

- » Single view of records and document for a selected matter
- » End-to-end workflow that does more than just move content
- » Notification and on-line steps touch all stakeholders

## A Proactive Approach for Managing Retention, Disposition & OCG Compliance

FileTrail Governance provides one central place to manage and implement retention policies — automatically applying them to relevant records across all information repositories to enforce compliance with firm IG policies as well as clients' outside counsel guidelines (OCG).

With FileTrail Governance, firms can take a more proactive approach to information governance:

- » Gain visibility across electronic repositories to manage retention and streamline review and disposition
- » Apply retention policies across all files related to a specific client or matter
- » Workflows alert lawyers, staff and other stakeholders when retention periods expire, and review and approvals are required for disposition
- » Track progress and capture a complete audit trail of all activity and approvals to demonstrate compliance with firm IG policies and client-mandated guidelines

### Customer Profile:

Ranking: A Global 50 / Am Law 50 firm

Attorneys: 1,000+

Connectors: OpenText eDOCS and HP ARM

Implemented Governance in 2015

### IMPORTANT ACCOMPLISHMENTS:

- » Governing 250M documents and records
- » Disposed of 3M documents
- » Disposed of 50k records

FileTrail is the leader in information governance for organizations throughout North America, the UK and the EU. Through long-term, partnering relationships with law firms, we have built knowledge that is reflected in our solutions.

As your partner, we guide you through the implementation of your IG strategy. We deliver physical records management, visibility and disposition of documents across your many repositories, automation of attorney transfers, and archiving of matter documents to lower cost storage.

We integrate with a major EDM systems, file shares, major financial systems, and security provisioning systems, to create a fully integrated and automatic solution that saves labor, reduces costs, and reduces the reliance on internal IT staff.

Stay on track with FileTrail. We'll help you get there. Contact us today for a quick discovery call.

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