

# Law Firm Delivers Superior Service with Easy Access to Case Files

## Business Needs

To support its reputation for clear communication, transparency and superior service, Finkelstein & Partners must provide staff and clients with fast access to all documents related to a case. The document management solution the firm had adopted in the mid-1990s was becoming outdated and the technology wasn't keeping up with the firm's ongoing requirements. Finkelstein & Partners needed a new solution for managing case files that would provide easy access to its 300+ employees at multiple locations and integrate with case management, litigation support and office applications.

## The Solution

With support from solution provider Tallega Software, Finkelstein & Partners implemented Upland's FileBound to manage all content related to case files, making them easily available to staff and clients using virtually any device. To maintain business continuity, 6 million documents from the previous system were transitioned to FileBound.

## Benefits

- Immediate, device-agnostic access to case files allows Finkelstein & Partners to offer a superior level of service and responsiveness to clients. Not only can the firm's 80 attorneys and staff find the documents they need instantly, clients can securely access their files 24 hours a day via the firm's website.
- Attorneys working in any of the 17 locations across three states can get the files they need and share them with staff, colleagues and clients via email, fax or other methods. FileBound also allows attorneys to take advantage of the convenience of electronic filing with the courts.
- Integrations with case management, litigation and email applications make it easy for attorneys and staff to incorporate content management into their daily routines and support greater efficiency.



Finkelstein & Partners, LLP, is New York State's largest personal injury law firm and has offices throughout New York, New Jersey and Connecticut. Founded in 1959 by Howard S. Finkelstein, Finkelstein & Partners is dedicated to providing unsurpassed client service and legal representation in the following practice areas: personal injury, workers' compensation, medical malpractice, products liability, veteran disability benefits and elder care.

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– Susan Roe, CTO  
Finkelstein & Partners

## Efficient document management empowers client communication

Since personal injury firms represent clients in some of the most difficult and emotional situations, it's key that attorneys have the tools they need to help their clients feel reassured. Finkelstein & Partners provides that reassurance through personal attention, transparency and clear communication. Using FileBound to manage all case files empowers Finkelstein & Partners to respond quickly to client requests and give them 24-hour access to their case files via the firm's website.

"A personal injury case file contains legal and medical documents of all kinds," adds Finkelstein. "FileBound manages everything related to a case and integrates with our case management system, which was developed in-house." The firm has also integrated other third-party litigation-based products with FileBound. This allows the entire system to share data, making it easy for attorneys and staff to find the client information they need quickly, regardless of which office they are at or what kind of device they are using.

## Painless transition to updated content management functionality

When Finkelstein & Partners needed to update the document imaging system they'd been using since the mid-90s, they wanted a system that would integrate with Microsoft Outlook® and Word® to streamline processes for the firm's staff of 300+, which includes 80 attorneys.

To maintain continuity, the processes and ways of organizing data in the previous content management solution were applied to the FileBound system, and more than 6 million documents from the old system were moved to FileBound.



### About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.

But Filebound delivers more than just a replacement for the previous system. "One benefit is that FileBound has created efficiency in mail distribution," says Finkelstein. "It has an easy integration into Outlook, so we are able to digitize mail and send it via email with a hyperlink to the document or the document attached."

**"The most important requirement is a system where our attorneys and employees can easily find what they need. Every single person in the law firm uses FileBound, and the ability to get easy access to documents ... helps us offer far superior service."**

– **Andrew Finkelstein**, Managing Partner  
Finkelstein & Partners

The ability to gather large groups of documents (such as a case file that consists of hundreds of pages) and securely share them has also increased the efficiency of the firm. The law firm uses FileBound to create a ZIP file to send large volumes of documents to a server or create a CD. When courts began to accept electronic filings, Finkelstein & Partners were able to leverage this convenience immediately.

"FileBound has been a very successful project for us, and Tallega has really helped us get there," adds Ms. Roe. "From the administrative side, FileBound is a great, user-friendly system which is quite easy to use. When a change to our operation needs to be done, our IT personnel can make the necessary changes to the FileBound software with little effort."