

Parker Poe Adams & Bernstein

"HyperOffice allowed Parker Poe to meet the requirements of a large institutional client without having to reinvent their IT structure"

-James Thomas
Head of IP Department

THE CUSTOMER

Parker Poe Adams & Bernstein is a well-established general practice firm with roots tracing all the way back to 1884. Currently, the firm has a total of 6 offices throughout North and South Carolina and a total of over 200 attorneys, including many acknowledged and prestigious lawyers. Although Parker Poe serves clients regionally, they also have a substantial amount of national, as well as international clientele.

THE CHALLENGE

One of Parker Poe's clients is one of the largest banking groups in the world, and James Thomas, head of the Intellectual Property team, is in charge of the client. The client provides personal, private, business and corporate banking and financial services, including insurance, mortgage, and investments and many other service areas.

The bank deals with high-volume work and needed a way to distribute and disperse information across all of its internal businesses in a time-efficient and organized manner. Obviously, managing it through email would get overwhelming considering the quantum of information that needs to be shared.

Where help was needed...

With the many subdivisions and businesses of the bank, they needed an organizational tool to be able to manage different types of information and control who had access to it. Moreover, they also wanted to allow certain people to be able to overlap their access permissions across different classes of information. All these requirements were thrown at Parker Poe, and James Thomas began the project of finding the perfect solution for the banks needs.

THE JOURNEY

The global bank, faced with this need, brought forth the challenge for Parker Poe. It was up to Thomas to find the perfect solution for his client. Moreover, he had to be careful not to get too carried away and strike a balance in terms of cost and implementation effort.

THE DISCOVERY

Thomas began with a general search of collaboration solutions. He knew that the tool should definitely have advanced document sharing and contact management capabilities. Additionally,

the ability to finely manage access permissions to information was a huge deal for the client, as it had to deal with a wide range of employees and administrators within the company. The bank could not risk classified information falling into the wrong hands.

Evaluating Solutions

After thorough research, Thomas eventually narrowed down to 3 very similar products, one of which was HyperOffice. He had started trial versions of all three, but soon ran into some issues. Thomas kept running into technical difficulties with one of the products, which became too much of a hassle, and the other product was too costly for his taste.

HyperOffice was a clear winner in terms of range of features, affordability and ease of implementation. HyperOffice proved to be very flexible in terms of set-up and ability to customize the portal. Thomas particularly appreciated the ease with which he could manage access permissions to information. He could fine-tune exactly what information each person could see and what they could do with that information. Moreover he could also manage access to modules, such as Shared Documents, Shared Calendars, etc. HyperOffice allowed users to not be overwhelmed with all the tools, and instead, let them have access to exactly what they needed.

HyperOffice also seemed to be suitable from a cost standpoint as it had a flexible billing model. Although there were set intervals on the number of users, you could also "pay-as-you-grow"; for each additional member you would pay the appropriate price.

Setting up the solution was a big hit with Parker Poe. Thomas didn't want to have to invest extra time at IT implementation, which is exactly what HyperOffice allowed him. There was no bother of setting up and maintaining servers. All of the company's information was saved and secured by HyperOffice, and backed up in case of computers crashing or just accidental deleting of files.

THE SOLUTION

After being chosen as the collaboration tool for Thomas' client, HyperOffice proved to live up to its expectations. The main reason the client went to Parker Poe was because of the need to organize and allow its internal businesses to collaborate and communicate efficiently.

Distributing information...

Now with HyperOffice, Thomas is able to provide the client with a more efficient means of communication. This global bank is able to break information down and distribute it across the entire company as needed.

Due to the number of services the bank provides, many different groups were created within the portal. For example, the insurance department has its own group separate from mortgage, loans, or savings. Additionally, there is a general company portal allows access to all employees.

HyperOffice allows each group, department and office to maintain its own central repository of information. Groups can have subgroups, for example, mortgage sales can have its own sub portal within the mortgage portal. Access can be fine tuned down to the individual, for example, the operations manager of the mortgage sector will login to his portal and have access only to that information within mortgage that is specific to his needs.

Document collaboration...

Shared documents allow employees to retrieve any forms they would need, such as 401k, or view employee benefits by simply entering the company's portal. The bank also uses shared documents to collaborate on reports generated by the different sectors. Instead of having to email

sensitive data and information, the bank is able distribute the files in a safe and secure manner. This allows for eliminating email attachments and sorted, organized files that are easy to find.

Access to contacts...

Managing a ranked global bank with numerous internal businesses comes with a huge network and database of contacts. Keeping tabs on the contacts is important. However, organizing them is the most important. Some contacts are only meant for a select group of people, while others are general contacts shared by the whole company. Parker Poe suggested the use of permissions to their client to allow different levels of access to contacts for different groups, or even different users.

THE IMPLEMENTATION

After the launch with HyperOffice, Parker Poe has been able to keep their client going for almost 3 years. After the success of the bank's adoption to HyperOffice, Thomas saw it as an opportunity for other clients. Although most of the company's other clients are not working on such large scales as this particular international bank, James felt HyperOffice's versatility would allow it to be used as a collaboration tool for them as well. He began introducing HyperOffice to other bank clients as well, and plans to open up to all clients that the intellectual property department works with.

THE RESULTS

Bottom line...

Parker Poe was able to provide a collaboration tool to a client without having to revamp their whole IT department. HyperOffice was easy to set-up and incorporate into the institution, even though it was a huge international bank with complex systems. James Thomas is so pleased with HyperOffice's capabilities that he plans to propose the solution to other clients as well.