

# LEGAL

## *Fraser Milner Casgrain LLP*

### Closing the Loop on Compliance and Business Performance

Fraser Milner Casgrain (FMC) is one of Canada's largest full service legal firms, developing from diverse roots over the past 160 years into one of the most highly integrated business law firms in Canada. FMC prides itself on being a local law firm with national strength, offering clients a broad base of legal talent and advice with more than 550 lawyers and a total of 1200 staff in seven offices located in Canada and the U.S.

That geographical distribution is mirrored in the FMC network where a Microsoft Exchange Server is maintained in each office and networked across the firm.

#### Opportunity

John Esvelt, Director of Information Technologies for FMC oversees the IT and Network assets of the firm, including the six Microsoft Exchange Servers maintained in each of the regional offices. Esvelt recognized the growing importance of message archiving and management in the firm. Handling more than 100,000 pieces of email everyday, FMC is a very message intensive environment, and as a leading business law firm it places a premium on record management, access, and retrieval.



*FMC's Director of Technology, John Esvelt, left, and Jatheon's President and CEO Kieron Dowling.*

In today's fast paced but highly regulated business environment, message archiving, access, and retrieval can play a key role in the ability of a law firm to grow the scale and pace of operations. It can also be a factor in its ability to adhere to the highest standards of compliance, privacy, and governance.

*“Jatheon Plug n Comply™ solution has allowed us to change our approach to backups and reduced the wasted time that lawyers need to spend worrying about managing their emails. We are now better positioned to easily respond to client needs and offer the highest standards of regulatory and privacy compliance.”*

-John Esvelt, Director of Information Technologies for Fraser Milner Casgrain



## Solution

Recognizing the need to provide a comprehensive solution that respected the distributed nature of the messaging architecture at FMC, Esvelt adopted the Jatheon Plug n Comply™ solution. He felt the Jatheon solution would give FMC the highest standard of regulatory compliance while optimizing operational performance.

“We provide an integrated local presence across our firm’s network, allowing clients access to a network of legal resources that is transparent to their need regardless of where they are located,” said Esvelt, “Maintaining transparency is important, but so to is our overall network reliability. When we looked at our archiving and compliance technology needs, we saw Jatheon as a reliable, long-term solution that gave us strong indexing capabilities and archiving functionality with no data loss over our full network.”

Configured to integrate with the firm’s EMC Storage Area Network and its Microsoft Exchange platform, the Jatheon Plug n Comply™ solution operates as a network appliance, delivering real network performance gains in a dramatically smaller storage footprint. Jatheon’s unique compression and indexing technology drives significant savings and footprint reduction by using only ten percent of the storage requirement associated with traditional message storage solutions.

The Jatheon Plug n Comply™ solution also significantly reduces the server demands for FMC’s operational messaging platforms while simultaneously improving retrieve and search capabilities. With its sophisticated message archiving and search functionality, the system can capture any network message and archive it in a unique and fully indexed system with full audit and authentication capabilities. That can be a significantly important feature in a business environment where legal firms are often asked to fully comply with privacy regulations on client files and materials. Failure to do so can expose the firm to issues of compliance liability.

## Impact

With the adoption of Jatheon’s Plug n Comply™ solution, FMC has significantly improved their message archiving, indexing, and retrieval capabilities. They have also optimized their IT resources and enhanced their ability to meet client needs.

“We are a law firm and as a result we take our legal obligations very seriously. Optimizing our ability to document, maintain, and access our history of counsel and advice is critical to providing our clients with the high standard of performance they have come to expect from FMC,” said Esvelt. “In the past we have had situations where our clients have needed to access historical information for the federal tax department. In one case we had to restore the email accounts of ten lawyers and every related assistant over a three year period. It was a very costly exercise and took over two weeks to complete with the support of a large number of staff. With Jatheon’s Plug n Comply™ solution, we can now do the same task in minutes and guarantee the highest standard of retention and retrieval. It’s phenomenal.”

As a result of adopting Jatheon’s Plug n Comply™ solution, FMC can now control the length of time message data resides on the primary email platform. The system will now allow users to independently perform full content searches on any and all company messages that are separately archived in the Jatheon system. It has created more independence for the firm’s lawyers and staff, less demand on IT staff, and better operational capacity for FMC’s Exchange servers.

Finally FMC can now fully and factually comply with client confidentiality by being able to quickly and accurately track all message information relating to client work and return it to the client and/or guarantee destruction of all relevant records in possession by the firm.

“The Jatheon solution gives us clear evidence of compliance on message management for the full life of our client relationships,” said Esvelt. “It closes the loop on protecting the liability of our clients and our firm. In the past all we could do was monitor the situation and work through a very cumbersome system when we needed to retrieve messages. With Jatheon, our message archiving, indexing, and recall ability gives us superior operational performance for our clients and a competitive advantage for our firm.”