



Halsten implements Custodian for Legal in the Legal Tech era

A while ago, the firm acknowledged the need of managing all information in one system. The aim was to select a familiar and easy-to-use system with a specific structure that guides end-users in the right direction. Ultimately, Custodian for Legal was selected as this solution utilizes the familiar interface of Microsoft Outlook. The legal department of Halsten works from within Outlook and thinks it is important that the new system integrates perfectly with their way of working.

Halsten is a legal service provider with expertise and experience on various jurisdictions. As an external legal department, Halsten's legal services are a valuable extension for many organizations. With a proactive attitude, clients profit from a business model in which the best value of money is the new standard within the legal services industry.

Within the firm it was expected that the old system would not provide enough control of internal and external data in the future, which was the reason to start searching for a Document Management System (DMS). It soon became apparent that the selected system did not comply with the requirements. It was impossible to get a grip on the location of files and to manage files in an efficient and secure manner without having to keep track of copies and versions that are filed to multiple locations. Furthermore, it was time-consuming and non-intuitive to file emails. The search for a suitable DMS continued hereafter.

The search led to implementing Custodian for Legal. This system enables internal and external parties to share documents in a secure and controllable manner. Custodian for Legal also allows users to work (together) on documents from within a central location and to file data quickly and easily. Halsten recognized at an early stage that clients and staff are working together more often and that they use the functionality to track down the history of dossiers. Custodian for Legal is based on SharePoint, which makes it possible to work together in the same document simultaneously. This saves time and ideally enhances productivity.

Halsten deploys Custodian for Legal for various purposes.

Dossier management

In the first place, Halsten uses Custodian for Legal for managing internal matters, documents and email communication that is involved around their matters. An orderly, accessible and secure workplace is created for each case within the organization. By managing all information in one central environment, it becomes easy to comply to legislation of filing and retention periods.

Collaboration rooms

In addition, Halsten establishes and manages collaboration rooms for large projects, such as wind energy projects. These projects often have a relatively long lead time and involve many different parties. Clients who execute specific developments, for example wind farms, often apply one fixed method based on a script as Custodian for Legal enables the possibility to automate scripts. This was the reason for inventing a structure that optimally facilitates the project development by using the DMS. Despite the huge document flow that is attached to the structure, Custodian for Legal enables users to easily participate in the process while avoiding unnecessary high investments.

Collaboration rooms are valuable to Halsten as they make it possible to work together with internal and external parties in an easy and secure manner. Additionally, they provide an additional service to their clients. External users can use their own Microsoft account to acquire access to the collaboration rooms. Clients can install the Custodian for Legal client so they can easily work from within Outlook as well.

Roel Hakvoort - Manager Operations at Halsten: "The collaboration with Transform Data International was pleasant and comfortable. All questions and requests are taken into consideration in a serious and quick manner, even though the team is often employed at multiple places at the same time. The project team is familiar with the common way of working and the challenges in the legal industry and this resulted in a close and committed relationship between us and Transform Data."

Rob Kubben – Managing Partner at Transform Data International: "The IT knowledge of Transform Data International and the legal and project-based approach of Halsten has established a strong team in which both parties complement each other. It was wonderful to see how an alternative and modern approach can lead to a great deal of appreciation from Halsten clients. We are proud that we are a part of this with Custodian for Legal."



Transform Data creates context based systems on the principle of "Business First, User First" and has a specific focus on professional and financial services organizations, law firms and legal departments. Their solutions strengthen the adoption of SharePoint and Office 365. They ensure the optimal use of information within organizations, and help organisations to optimize their employees' total productivity by combining documents, tasks, workflows, external data and reports into one context based user interface.