customer success story

'Using Repstor affinity has been a revelation for us in the Legal department at KANA. I use the product myself on a daily basis and find it incredibly easy and intuitive to use.'

John Murray
Head of Legal
KANA, A Verint Company

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A *VERINT.* Company

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A **VERINT.** Company

Project Overview

The legal team at KANA® manage contracts and other legal documents for the many thousands of customers serviced by the organization worldwide. This includes keeping relevant email and other content in customer folders so that the legal team, which is typically dispersed across the many offices worldwide, is able to file, access, manage and collaborate around this content. Therefore the goal of this project was to enable email to be easily filed and to provide quick, convenient access to content whether on or offline.

KANA.

Client Background

KANA®, A Verint® Company, is a leading provider of cloud and on-premise customer service solutions. KANA helps global organizations including many of the Fortune 500, mid-market businesses and public sector agencies optimize their engagements with consistent and contextual customer journeys across agent, web, social and mobile experiences.

Using KANA solutions, organizations can reduce operational costs, increase resolution rates and improve brand loyalty.

Learn more at www.KANA.com

KANA benefits from instant filing, improved collaboration and offline working for legal emails, contracts and other content.

We achieved this by...

Accessing and filing of legal documents and email was previously a laborious slow process with offline access proving challenging for the Legal team at KANA. By using Repstor affinity and assist the legal team at KANA has gained the following benefits:

– Users file relevant emails and other content immediately rather than leaving this previously cumbersome task for another day, so everyone has access to relevant content more quickly improving collaboration

– Access to shared content is immediate with no waiting on uploads and downloads over slow networks

– Users have access to the content on and offline so they can work at a time convenient to them

– Despite having more than 10,000 folders of content, filing is fast and efficient using the assist product

Motivation

KANA has a legal team that is spread across multiple locations with a number of staff who travel extensively in support of its global business.

In order to support collaborative working, Microsoft® SharePoint® was in use to store legal documents and other content. While this meant that content was added on a consistent basis the process was time consuming. In particular the filing of email content was extremely slow and cumbersome and there was no effective solution capability for legal team users to use when working offline. The filing process was therefore typically deferred until a suitable timeslot for filing was available to the individuals, delaying when other staff would have access to that content.

Since email is an important source of documents and other key information essential to effective team working, this resulted in collaborative working being less effective than it should have been (not all information was up to date and readily available resulting in a need to check with other staff if the relevant content that had not yet been centrally filed was currently available).

There were also huge numbers of folders relating to individual contracts and other legal matters which made locating, accessing and filing content time consuming and cumbersome for the users. This all resulted in decreased productivity.

Challenge

As well as these issues around filing and retrieval, the lack of a solution with effective offline working was an issue for many members of staff who were travelling regularly. This meant that users had to remember to copy information at a later time leading to duplication and silos of content that could easily become out of date resulting in the merging of changes becoming a real issue on returning to the office.

Being geographically diverse, the impact of network latency for those users remote from the system provided for slow upload and download times leading to frustration when adding or accessing the documents and other content. This resulted in lower productivity for those users, with the temptation again to take copies causing all of the associated issues of keeping those silos up to date, such as avoiding duplication and accurately merging changes.

In the period prior to the project KANA had begun to acquire a number of companies. This meant that there were silos of legal information spread across a number of systems and locations. Consolidating this information posed an extremely time consuming and tedious challenge for users responsible for this task.

'Using Repstor affinity has been a revelation for us in the Legal department at KANA. I use the product myself on a daily basis and find it incredibly easy and intuitive to use. It has completely changed my filing behavior. Previously I left filing to an intensive hour or two on a Friday, but because of the ease with which I can file the content using affinity I now file as I go, which means the whole team has access immediately to the new files/email.'

John Murray, Head of Legal at KANA

The Solution

Quick Adoption

After a short trial with a small number of users demonstrating how effective the Repstor products are in a challenging environment with large amounts of content and more than 10,000 folders of information, Repstor affinity and assist were installed for all of the legal users across the company.

Easy Integration

No changes were required on the SharePoint® system, the clients were simply installed on the users' laptops.

Repstor affinity allows the users to access their content directly from the familiar Microsoft Outlook® interface and provides full offline working for those users travelling on business as well as providing the users with the ability to add and import content easily from other content sources such as File Shares.

Rapid Filing

Repstor assist was installed to provide filing assistance. With the large numbers of folders in KANA's system filing by drag and drop while possible is not the ideal solution for productivity or accuracy. Repstor assist meets this need allowing users to file with a few keystrokes to the correct folder location and also provides suggested locations based on the contents of the item being filed and the pre-filed content in the system.

The familiarity and ease of use provided by Repstor products through the Outlook® user interface meant that no training was required.

The installation was completely standard, users were able to connect to the appropriate content on the SharePoint® system and start working immediately.

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Results

Users now file legal content as it is received/generated and individual users have extremely fast access to their content wherever they work, on or offline. Email content is consistently and accurately filed, users can find it easily using the tool that they are most familiar with and the email retains its attributes so that users can still reply/forward and utilize Outlook® functions as they would normally do with the other email content in their Outlook® environment.

✓ **User confidence**
Users now have confidence that all of the latest and relevant information is available to them as early as possible making collaborative working faster, easier and more effective.

✓ **Ease of filing**
Filing time has been significantly reduced, as has the time spent looking for information and users have consistent access to their content when travelling allowing more effective working while on the road.

✓ **Removal of information silos**
Offline workers no longer need to copy information running the risk of duplication and of generating information silos, and because the most effective way to work for the users coincides with the company's requirement to keep a single consistent set of legal content this is now achieved with both users and the organization's needs being met.

Why Repstor?

Repstor was chosen because of a number of factors combining to make the Repstor products the most productive and effective solution for the KANA legal team in the various scenarios faced by users on a day to day basis. Repstor affinity and assist help the users get their day to day job done with the minimum of fuss therefore maximizing productivity. The key points influencing the decision to deploy the Repstor products were that they enable users to:

– effectively access SharePoint® content (and other content) from within Microsoft Outlook®

– load information quickly and effectively without waiting for uploads/downloads to complete

– quickly and easily file email content to the appropriate folder location

– handle large volumes of information and folders without slowing down Outlook®

– work effectively when offline, including the ability to file email and other content with offline access to key content

None of the competing products met all of these requirements in the consistent way and with the high performance that the Repstor products exhibited, resulting in users being more productive and are able to take advantage of the software with zero training requirements. KANA now has a single source of legal content with no uncontrolled copies and duplication on users' laptops.

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ensures ECM projects are successful

by increasing user adoption.

www.repstor.com

repstor Titanic Suites, 55-59 Adelaide Street, Belfast, BT2 8FE, United Kingdom

For more information on how repstor can help you, contact:

+44 (0)28 9072 6061
contact@repstor.com