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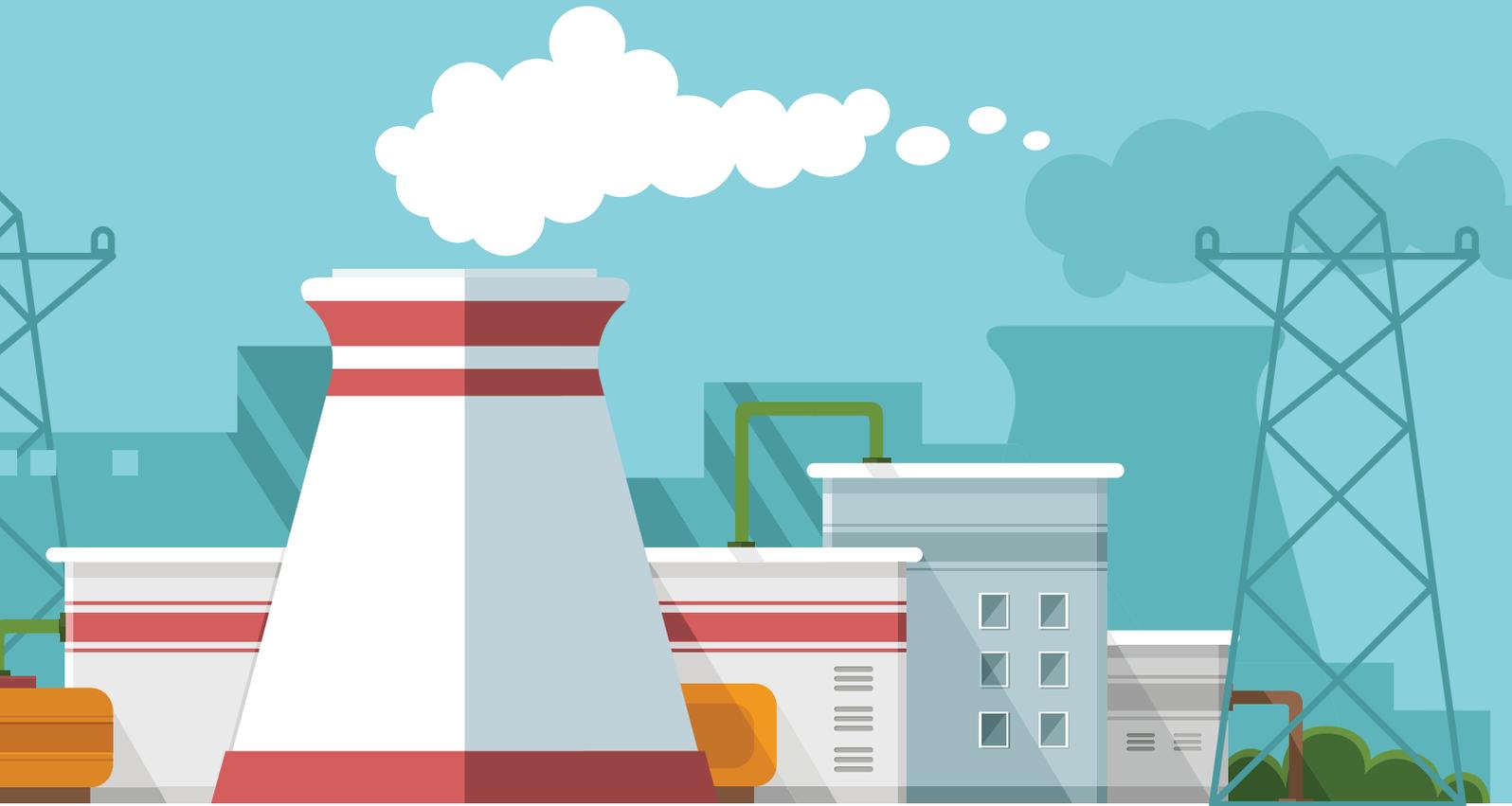
National Grid deploys **Office 365-based ES/Unity™** - enabling new ways of working and greater consistency and efficiency in legal matter management

National Grid plc is a British multinational electricity and gas utility company headquartered in London. It is one of the world's largest investor-owned utilities, and plays a vital role in connecting millions of people to the energy they use - safely, reliably and efficiently.

The company has a large internal legal department in the UK. This is made up of six teams which provide legal services to more than 17 business entities and 24 business areas.

A reorganisation of the business, and a drive to provide more with less across National Grid as a whole, prompted the legal function to bring improved consistency and coordination to the way it managed legal matters.

"Previously there were lots of different, legacy ways of doing things, and a number of different document management systems and approaches in use, and we wanted to move to a standardised approach - to improve productivity, simplicity and efficiency," explains Mo Ajaz, National Grid's Group Head of Legal Operational Excellence. His role is to ensure that any IT investments within the legal department achieve the desired results for the business.

National Grid's legal teams are dispersed geographically, and many individuals work from home at least one day a week. But as long as legal documents and email trails were spread across Microsoft SharePoint, shared drives and individual personal folders within email archives, effective collaboration wasn't really possible. "Document storage and retrieval processes were not ideal," Mo says. "For people to be more effective and productive in their jobs, they needed to be using the right tools in the right way."

Legal knowhow smooths the transition

Rather than invest in a dedicated legal document management system, National Grid wanted to make fuller use of standard software that users had already. "We conducted a detailed analysis and decided against a dedicated system - due to the cost and maintenance implications, and because we wanted something that could be a common denominator across the business," Mo explains. "Elsewhere we have consultants doing document management in SharePoint, so it made sense to standardise on that - with the right controls in place."

After a thorough review of the market, National Grid chose ES/Unity, Powered by Repstor™, an Office 365-based matter lifecycle management solution which harnesses companies' existing Microsoft Office/Outlook and SharePoint environments. It brings consistency to the way individuals store and access matter-related documents and emails, without requiring that users change the way they naturally work.

Designed to complement Office 365, the software allows matter workspaces to be easily designed and created in SharePoint online but also surfaced through native integration with MS Outlook. This allows lawyers to work with their matters using a familiar Outlook user experience for email filing, document management and collaboration, and managing the matter lifecycle.

Crucially, ES/Unity was developed in partnership between respected global legal firm Eversheds Sutherland and Microsoft Gold Partner and information management specialist Repstor. The product was developed specifically with legal teams in mind, and with direct input from experienced legal teams. Eversheds Sutherland provides the associated implementation consultancy too supported by product specialists from Repstor, to ensure a smooth implementation and high user adoption and acceptance.

"I already knew the Eversheds Sutherland consultancy team, and had an existing customer relationship, so we trusted them," Mo says. "They bring an agility – the ability to scale resources up or down – which we can't match."

User acceptance at record levels

Thanks to Eversheds Sutherlands' insider knowledge of legal processes, National Grid's legal organisation felt confident it was buying a tried and tested product that people would be able to adopt and use without issue, coupled with an easy implementation process.

"With ES/Unity we're still using SharePoint but with a folder structure that's been optimised for inhouse legal teams and law firms," Mo notes. "The fact that it makes use of familiar, existing technology means it has gone down well with our teams."

So much so that in a follow-up user survey, after the new ES/Unity matter management solution went live in December 2017, 87 per cent of legal team members said their experience of ES/Unity and the new way of working was 'excellent'. The remaining 13 per cent were happy too, describing the new set-up as 'good'. These are the kind of acceptance statistics that Mo dreams of, as a champion of operational excellence.

"Everyone is very happy," he says. "Collaboration is very good, there's improved visibility of where things are and what is happening, and people are working well and retrieving matter-related content easily. Meanwhile the risk of information being lost to people's personal email folders if they leave has gone. All matters are now stored centrally and are accessible to all team members based on their security privileges."

There are clear productivity benefits too, he continues. "By retrieving the metadata collected, we can understand more about the capacity and workload. We're also adding a time-recording facility as part of our ongoing work with Eversheds Sutherland and Repstor."

Legal's success sets a precedence within the business

The working relationship with Eversheds Sutherland Consulting, and with Repstor which provided product support, has been pivotal to the smooth experience that has been delivered, Mo notes.

"The success of this project owes as much to the infrastructure and the ease of implementation as to the ES/Unity product itself," he says. "The consulting team went over and above the call of duty, holding our hands as we tackled internal processes."

Word of the project's early success has already spread to other parts of National Grid's business. In addition to the whole of the UK legal function, the Risk and Head of Investigations functions have also rolled out ES/Unity. And the Company Secretary's office, Property and other parts of the business are interested too. "We've done a 'show and tell' exercise," Mo explains. "And, having seen how easy ES/Unity has been to adopt, enthusiasm has spread across the business."

Based on the project's successful adoption, in early 2018 National Grid entered it for **The Lawyer Awards for Most Innovative Use of Technology**.

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