

Case Study





## Eisner LLP Meets Regulatory Document Retention Requirements by Going Paperless with Interwoven

As one of the top certified public accounting and advisory firms in the country, Eisner LLP is in the business of managing and working with vast amounts of content—within the firm, as well as with its clients. In serving the diverse needs of clients including individuals and publicly held corporations, the firm’s professionals draw on content ranging from financial records, to audit guidelines and legal documents. This content had existed in paper form—creating numerous problems for the firm. Collaboration among teams in different locations was an inefficient process with no system to share knowledge. And files that were checked out or missing caused frequent productivity bottlenecks. Eisner’s paper problems also made it difficult for the firm to comply with industry standards for records management and retention.

Eisner LLP decided that things had to change. “The paper was burying us,” says Gary Rosenberg, CIO and Principal. A move to new offices provided an ideal opportunity to clean house both physically and strategically. By eliminating paper, the firm would enable its accountants, auditors and analysts to share documents from the client site, from home or from any location at which they were working. Compliance with industry document retention standards would be

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*Gary Rosenberg, CIO and Principal, Eisner*

built into new document management policies and the system that supported them from day one. The potential gains in productivity and client service were compelling enough reasons to proceed, and an analysis conducted by Rosenberg made the decision a no-brainer: “I found the reduction in costs for paper storage space alone would pay for the hardware and software by itself.”

### From Paper Piles to Maximum Productivity in Record Time

Eisner began with a full evaluation of available collaborative content management products. When Premier Technology, an Interwoven partner, presented a demo of Interwoven WorkSite, the firm knew it had found its solution. In addition to full-featured document management and collaboration capabilities, WorkSite provided tight integration with Microsoft and the tools that Eisner’s professionals used every day. WorkSite also provided for a strong security model, which made the firm and its clients comfortable using the system. And there was no question that WorkSite helped meet the firm’s document retention and management policies. Customization was easy with minimal setup time; in fact, assisted by Premier, Eisner migrated its entire legacy repository into WorkSite in only three hours.

With WorkSite up and running, Eisner’s document management and collaboration initiative has quickly picked up speed. The firm’s longstanding focus on records management and retention standards has proven especially prescient in light of the recent increase in regulation and scrutiny under the Sarbanes-Oxley law and other new rules. “We are way ahead of the curve on this,” says Rosenberg. “The new rules are in line with the standards we’re already set up to enforce, and WorkSite gives us capabilities like a centralized, searchable repository, e-mail management and a complete audit trail to make sure our policies are followed to the letter firm-wide.”

#### Industry

Accounting

#### Challenges

- Improved compliance with SEC, NASD and Sarbanes-Oxley regulations for records management and retention
- Eliminate problems associated with paper documents such as out-of-control storage costs and productivity bottlenecks
- Inefficient access to content

#### Benefits of Using Interwoven:

- Complete audit trail and content capture in a central repository improves regulatory compliance
- Firm-wide adoption ensured by WorkSite’s out-of-the-box integration with Microsoft Office
- Instant access enables secure collaboration
- Rapid payback through savings in physical storage costs alone



*Eisner LLP, a top 25 tax and accounting firm, provides certified public accounting and advisory services to clients ranging from individuals to publicly held corporations.*

## Solution

Interwoven WorkSite Server software provides an architectural framework that allows business content to be centrally managed, shared and collaborated on in a secure manner across the organization. WorkSite enables document management, collaboration, knowledge management, workflow and business automation.

### Delivering Benefits Firm-Wide

By bringing all of Eisner's professionals into a unified collaborative content management environment, WorkSite has enabled productivity gains throughout the firm. Eisner's professionals can now draw upon knowledge management capabilities that include a library of best practices, past engagements and industry-specific checklists numbering in the thousands of pages. Client files can be accessed and collaborated on securely via the Internet, eliminating the expense of locating or recreating files that were missing or in use elsewhere. "Missing files were a major problem in getting things done," says Rosenberg. "Interwoven has made that problem go away entirely. Having a single workspace has also paid off in security and access control. Instead of checking files out or e-mailing documents, users can simply send links to each other, or drag and drop short excerpts into e-mails. Everyone using it has made the same comment—it makes their lives much easier," says Rosenberg.

Eisner's internal accounting group is using WorkSite to eliminate the paper-pushing associated with compiling client content. For example, all content associated with a client's tax return is stored securely within WorkSite—particularly helpful during tax season when documents are added and updated constantly—giving accountants access from Eisner's offices, the client's office, or any other location. And by securing all materials within a workspace, the firm has established a complete audit trail that captures all internal and client content in a searchable repository.

Accountants in Eisner's Litigation Support Services group use WorkSite to share knowledge and make client documents readily available in court. Before, these professionals would spend extensive time indexing of paper files for each case; it could easily take three days to find a given document. Now documents are scanned and imported alongside electronic documents in WorkSite. Discussion threads, notes and knowledge can also be securely stored within WorkSite for reference with case documentation.

WorkSite continues to deliver new benefits in all areas of Eisner's business. Rosenberg has been especially impressed with the solution's ability to work seamlessly within existing practices, while bringing productivity to new heights. "It's really ubiquitous: it is intuitive and provides powerful functionality within our natural work environment. That is what makes it so usable."

### About Interwoven

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments. Our unique approach combines user-friendly simplicity with robust IT performance and scalability to unlock the value of content. Some of the most recognized enterprise and professional services organizations worldwide have chosen Interwoven, including: adidas, Airbus, Avaya, Cisco, DLA Piper, FedEx, HSBC, LexisNexis, Microsoft, Samsung, Shell, Samsonite, White & Case, and Yamaha. Over 20,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit [www.interwoven.com](http://www.interwoven.com).

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