



Leading New Zealand commercial law firm Simpson Grierson switched to cleanDocs for more efficient metadata cleaning and even greater security against data breaches. The firm is also using cleanDocs to comply with proposed changes to New Zealand's Privacy Act.

Preparing for changes to data privacy regulations: How Simpson Grierson improved and streamlined its metadata cleaning

The business need

Comply with stricter data regulations in New Zealand – including proposed changes to the current Privacy Act

Help staff feel confident that they are properly managing sensitive client information in documents sent outside the firm

Switch to metadata cleaning that has better handling of cross-references in documents

Move to a solution with better performance and fewer interruptions so staff work more efficiently

Consolidate the number of vendors the firm deals with by deploying multiple products from the same technology partner

Integration with iManage for simpler metadata cleaning workflows

About Simpson Grierson

Simpson Grierson is one of New Zealand's leading full-service commercial law firms. It has over 330 staff members located across three offices in Auckland, Wellington, and Christchurch. The firm is the country's only member of Lex Mundi, the world's leading association of independent law firms. Simpson Grierson champions inclusivity and became the first New Zealand organization to be awarded the Rainbow Tick in 2014. It was awarded the Supreme Award at the White Camellia Awards in 2017, a program recognizing businesses promoting gender equality through the UN Women's Empowerment Principles.

Knowing when it's time for a change

Data regulations are being strengthened the world over and New Zealand is no exception. Parliament is seeking to amend the current Privacy Act to include mandatory data breach notification, with fines of up to \$10,000 imposed for failure to comply. As New Zealand strengthens its data privacy laws to help citizens feel better protected, firms like Simpson Grierson must ensure that metadata that could identify an individual is securely removed from shared documents.

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Valerie Fogg
Information Services Director,
Simpson Grierson

About DocsCorp

DocsCorp designs easy-to-use software and services for document professionals who use enterprise content management systems. The DocsCorp product suite is built to drive business efficiency and increase the value of existing technology investment. DocsCorp is a global brand with customers located in the Americas, Europe, and Asia Pacific. More than 3,500 organizations rely on DocsCorp software every day.

Information Services Director at Simpson Grierson Valerie Fogg said that the firm recognized the risk of metadata leaks years ago and implemented a solution to clean metadata from shared files. "Users already have a good understanding of metadata because of the awareness that comes with having used other products," said Valerie. "However, the IT Department found that our old solution wasn't cleaning cross-references from documents emailed by the Commercial team," she continued. This was a major issue for the firm because they couldn't retain cross-referencing in cleaned documents.

Simpson Grierson needed a metadata scrubber that would manage metadata in every email and every document, and not cause extra work for staff. Valerie described how "the firm wanted to consolidate the number of vendors we were working with, so we looked at cleanDocs from DocsCorp since we were already using other solutions from their suite." These other solutions are compareDocs for document comparison and pdfDocs Binder for automated electronic binder creation.

Finding a more reliable alternative

Staff at Simpson Grierson found cleanDocs was a more reliable alternative to the firm's incumbent software since it was able to accurately remove metadata from every document they ran through the application. "Staff liked it as an alternative because better performance and fewer interruptions empowered them to work more efficiently, and they knew they could trust cleanDocs was working behind the scenes as intended," said Valerie. Enhanced metadata management lessens the possibility of a data breach occurring. Less chance of a breach means less chance the firm will face penalties imposed by data regulations like New Zealand's Privacy Act.

Another key reason why the firm chose cleanDocs, according to Valerie, was that cleanDocs was more customizable than the previous application, and the firm used it to make metadata cleaning "as easy as possible" for the end-user. "So, cleaning is turned off for internal messages, and users are only prompted when an email poses a risk by being sent externally," explained Valerie. cleanDocs' customization means staff from all four practice areas can create cleaning policies to manage metadata according to their needs. "This helped solve the issue of cross-reference scrubbing for the Commercial team since they could define at a departmental level which metadata should be scrubbed or remain untouched and in general provided more choices around managing Track Changes and comments," said Valerie.

Training and user onboarding were simple and happened quickly. The firm's trainer put product videos together and shared them via the intranet. And the feedback from users now? "We get far fewer calls to Service Desk for help now, and users are finding it more intuitive," observed Valerie.

Simpson Grierson plans to use cleanDocs' email recipient checking technology in addition to metadata cleaning to minimize the risk of an accidental data breach. "cleanDocs' email recipient checking feature will empower the firm's staff to manage risk individually, so the burden of data protection won't only fall on the shoulders of the IT Department," said Valerie. "Users have to do their own risk management, no matter how busy they are. They need to make the right checks."

Summary

In switching to cleanDocs, Simpson Grierson has strengthened its defense against accidental data breaches at the same time it made metadata cleaning a quick, easy, and accurate process for staff. Now, everyone at the firm can enjoy the peace of mind that comes with knowing sensitive client information is protected against inadvertent leaks.

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