

## Consolidating Core Business Processes at Scale with Mitratech's Matter Management System

### *The TD Synnex Story*

See how TD SYNNEX innovates with TeamConnect and TAP to save time and create a single, scalable source of organizational truth.



## The Company

TD SYNNEX is an American-based, industry-leading IT distributor and solutions aggregator of the IT ecosystem known for delivering compelling technology solutions to a dynamic global marketplace of over 150,000 customers while spearheading renowned corporate social responsibility programs. Offering services from over 22,000 professionals across 100 countries, the organization helps its clients maximize the value of IT investments, demonstrate business outcomes, and unlock growth opportunities.

## The Challenge

Following a merger between the companies once known as Tech Data and Synnex, TD

SYNNEX emerged as one of the market's largest IT distributors, uniquely positioned to serve partners and vendors with a comprehensive portfolio of products, solutions, and service offerings. But to keep up with the level of growth its organization was experiencing — both organically and as a result of the merger — the enterprise realized the need for a scalable, configurable matter management solution.

TD SYNNEX wanted to enhance the search functionality of its matters and enjoy centralized access to knowledge. Its grandfathered matter management solution, which had originally been built for the team through a document management system, made it difficult to track matters and necessitated countless manual



hours of updating various excel spreadsheets for reports. The IT distribution leader knew their legal and compliance teams could gain time back in their day-to-day operations by automating a majority of the manual tasks on their plates, including building reports for litigation. And with so many departments now collaborating cross-functionally, it was critical to have a central source of organizational truth.

**“It was important for us to have a consistent, single source of data to understand the work that we are doing in support of the business.”**

**CLAY DAVIS**

Director, Global Legal & Compliance Operations

Additionally, TD SYNNEX’s existing homegrown system required lengthy and time-consuming IT tickets to update — and with the enterprise’s rapid growth trajectory, it needed a more intuitive, configurable platform that could keep pace. Looking for a solution to scale with them as they grew, **they turned to Mitratech.**

## The Solution

TD SYNNEX’s decision to deploy Mitratech’s TeamConnect for their matter management needs and TAP as their workflow automation solution came down to three key platform differentiators:

**1. Scalability** — Having outgrown its previous system, the team needed a flexible, configurable solution that could continue to meet its goals well into the future. With deeply-flexible industry integrations and user-friendly interfaces, Mitratech’s TeamConnect and TAP offered a platform approach comprehensive enough to consolidate all business-critical processes, but still agile enough to scale in highly-complex environments.

**2. Configurability** — TD SYNNEX’s team needed to be able to make fast and efficient changes without putting requests on the already-full plate of their IT department. TeamConnect’s easy-to-use drop-down templates and new field creations gave them the ability to capture new data self-sufficiently. Additionally, the platform’s robust global search capabilities gave the TD SYNNEX team access to every record, field, note, comment, invoice, and document to save time and eliminate siloed data sources.

**3. Partnership** — TD SYNTEX was looking for a reliable, long-term partner that would co-innovate alongside them, not a quick-fix point solution vendor. Mitratech's attention to detail and proven history of success as a 35+ year leader in legal technology gave the TD SYNTEX team the confidence they needed to move forward with implementation.

**“We wanted to be convinced that they [our vendor] were not going to be gobbled up by somebody else, that we wouldn’t be lost in the shuffle. We wanted to pick somebody that was going to be around and could partner with us longer term.”**

**CLAY DAVIS**  
Director, Global Legal & Compliance Operations



## The Results

With TeamConnect, TD SYNTEX was able to automate litigation report upkeep, saving their team time by reducing the need for manual data entry and mitigating the risk associated with version control concerns. The team was also able to achieve their goal of leveraging in-process analytics with Mitratech's reporting capabilities, which gave leadership an easy-to-access, centralized view of data through dashboards. The availability of these analytics within the platform helped solve any data validation concerns, as it was all created and stored in a single, controlled source of truth with advanced security and permissions.

**“Technology, in general, is a driver for us because we see it as a way to capture data to develop a better understanding of the work we’re doing, for whom, how long it’s taking us, and where we have opportunities to improve.”**

**CLAY DAVIS**  
Director, Global Legal & Compliance Operations

In addition to saving time and driving efficiency in-house, TD SYNTEX is seeing positive results in enhancing responsiveness for its clients by leveraging TeamConnect + TAP.