

# Case Study



**Schwäbisch Hall**  
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## Schwäbisch Hall: Legal Matter Management with Microsoft

### Company Profile

Schwäbisch Hall is Germany's largest building society, with around 7 million contracts and a market share of more than 33 percent in home savings products. The company is also one of the country's leading home financing providers. As a partner of the cooperative banking sector and part of the DZ BANK Group, Schwäbisch Hall offers solutions for sustainable building and living. Approximately 6,700 employees and sales partners provide qualified support and advisory services to customers.

<https://www.schwaebisch-hall.de/>

### Technologies

**#Legal Matter Hub**

### Challenge

- Replacement of the existing legal management solution due to discontinued product support and changing licensing conditions
- Need for a modern matter and records management solution for the Legal and Compliance department
- Seamless integration into the existing IT infrastructure

### Solution

- Implementation of the novaCapta Legal Matter Hub based on Microsoft 365 and SharePoint
- Support with migration of data from the legacy system
- Reuse of existing permission structures and established ways of working within the Microsoft ecosystem
- Flexible customization of the modular solution to meet specific business requirements

### Benefit

- Cost savings through the use of existing Microsoft licenses instead of additional specialized software
- Intuitive user experience within a familiar Microsoft environment, minimizing training effort
- Centralized platform with high usability for matter management, collaboration, internal communication, and knowledge management
- Improved documentation, compliant central storage, and easy access to information for audits and regulatory reviews

Schwäbisch Hall is Germany's largest building society, with approximately 7 million contracts and a market share of more than 33 percent in the home savings market. The company is also one of the country's leading home financing providers. As a subsidiary partner of the cooperative banking sector and a member of the DZ BANK Group, Schwäbisch Hall offers its customers solutions for sustainable building and living. Around 6,700 employees and sales partners across both internal and field sales ensure professional support and advisory services. In addition to continuously developing its core business areas of home savings and home financing, Schwäbisch Hall addresses challenges such as platform business models, smart data, and ecosystems as a solution provider for the building and housing sector. Sustainability is also an integral part of Schwäbisch Hall's strategic agenda.

The Legal and Compliance department had been using a specialized legal management solution. When the product was announced for retirement and licensing conditions and costs changed, they began looking for a future-proof alternative.

The goal was to establish a modern platform that could structure legal matters, preserve knowledge over the long term, improve collaboration, and seamlessly integrate into the existing Microsoft 365 environment. novaCapta was chosen as the experienced partner with a tailored solution. Key factors included not only the right technological foundation, but also novaCapta's experience in aligning solutions closely with customer requirements.

### **Legal Matter Hub as an Integrated Microsoft 365 Solution**

The novaCapta **Legal Matter Hub** was implemented based on Microsoft 365 and SharePoint. In addition to being easily integrated into the existing IT landscape, the platform leverages existing user and permission structures through Microsoft Entra ID and can be flexibly adapted to individual customer requirements. As a pilot customer, the Legal and Compliance department actively contributed to the further development of the solution.

Key requirements such as structured matter files, a central landing page for internal communication, and the ability to store, link, and collaboratively edit documents online are fully supported. At the same time, the close integration with familiar Microsoft 365 applications simplifies daily work by reducing unnecessary system changes.

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**With the Legal Matter Hub, we now have a solution that structures our matter management, preserves knowledge for the long term, and significantly simplifies collaboration across our legal department. What is particularly valuable for us is that everything is integrated within the familiar Microsoft environment.**



**Simon Frohmader**

Bereich Recht und Compliance,  
Bausparkasse Schwäbisch Hall AG

Existing Microsoft 365 integrations and plug-ins, including Outlook integration, further streamline daily processes. Emails can be archived directly from Outlook into the Legal Matter Hub and assigned to the relevant matters in a structured manner. As a result, Schwäbisch Hall introduced a comprehensive solution that supports the entire legal matter lifecycle, from intake and case processing through to knowledge management.

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## **Greater Collaboration, Better Information Access, Less Training Effort**

Today, the Legal Matter Hub has been rolled out across the entire Legal and Compliance department at Schwäbisch Hall. The solution serves not only as a centralized repository for matters and documents, but also as a communication and knowledge platform. Information, templates, and relevant documents can be centrally provided, shared, and quickly retrieved. This ensures that valuable case knowledge is preserved over time and remains available for future matters.

The benefits are particularly evident in day-to-day collaboration. Documents can be edited simultaneously, information is accessible online, and content can be linked directly. This not only simplifies internal coordination, but also improves documentation processes for audits and regulatory reviews. Employees also benefit from the familiar Microsoft user experience, keeping training requirements to a minimum and enabling users to learn many functions while working.

Because the solution is built on existing Microsoft 365 licenses and infrastructure, additional licensing and system costs are reduced. With this new platform, Schwäbisch Hall is well prepared for future requirements. Data and processes are now structured and available within the Microsoft Cloud, creating a strong foundation for future AI-driven scenarios. The Legal Matter Hub therefore serves not only as today's operational platform, but also as a key building block for the ongoing digital transformation of the Legal and Compliance department.



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