



**Over To The Cloud:
Going Beyond A DMS Implementation**

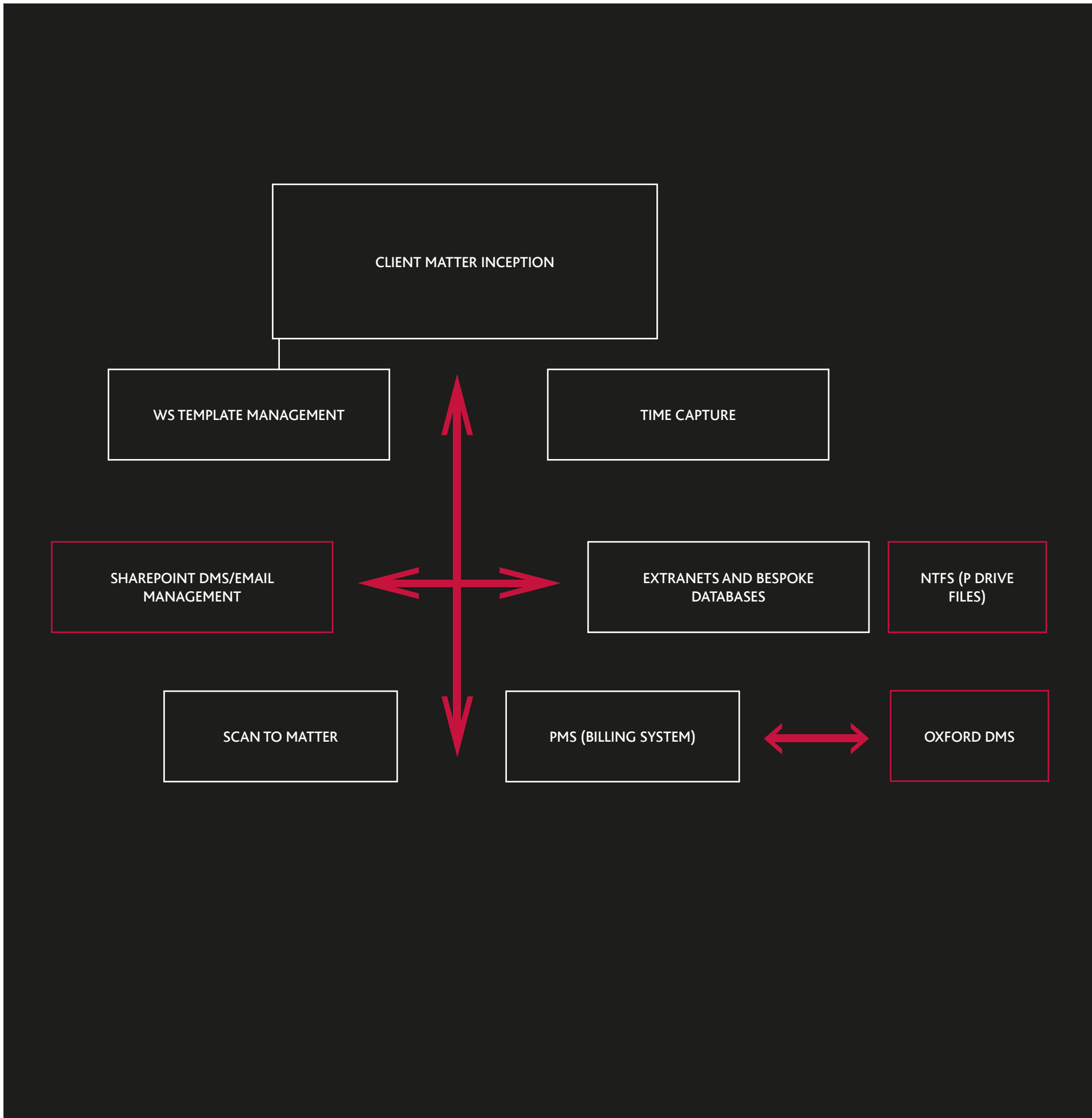
OVER TO THE CLOUD:
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Where We Were

Winckworth Sherwood (WS) was using a Microsoft SharePoint 2013 based solution as its Document Management System (DMS). The SharePoint-based system Macroview was first implemented in 2010.

Following an IT review in 2015, WS decided that the current platform was no longer meeting the needs of a growing business and not the solution to take the firm forward into the future.

Although the on-site solution provided sleek integration and automation between various systems, the growing content, the management of servers and system performance continued to be a challenge despite both the infrastructure and software upgrade. A separate DMS server also had to be maintained at our Oxford office.



OVER TO THE CLOUD:
GOING BEYOND A DMS IMPLEMENTATION

Drivers for change

Overall, our users wanted a better, faster and more stable DMS.

The drivers for change include:

1

Improve efficiency through better system functionality

2

Easier and faster searching and filing of both documents and emails

3

Better integration of various applications already in use by the firm

4

Better collaboration and standardisation of DM practices across all teams and offices

WS

OVER TO THE CLOUD:
GOING BEYOND A DMS IMPLEMENTATION

Going Beyond The Usual DMS Drivers

Following a lengthy process involving a series of demonstrations from the DMS vendors, interviews with existing Partners and IT Directors from other law firms and our own research on the use of cloud solutions versus keeping and maintaining a DMS on or even hosted off-site, it was clear to us that pursuing the cloud strategy – a single instance cloud platform in particular, was the way forward.

We have been researching cloud-technologies for a couple of years before the IT review so this has set the scene for IT to deliver more than just the traditional document management system. With Senior Management's support, the decision to pursue a SaaS-based cloud strategy for our DMS was made. The firm has also started the roll out of a Salesforce-based SaaS legal CRM system in 2017.

Beyond the usual drivers for change mentioned above, our objectives expanded to take advantage of the power of modern cloud-computing:

- 1 Strengthen information and data security demanded by clients
- 2 Provide agility and better business continuity options for our users
- 3 Provide a more modern and intuitive interface
- 4 Provide infrastructure stability and scalability
- 5 Provide visibility for matter-based KPIs, compliance and real-time alerting
- 6 Provide the firm with continuous innovation

With this vision in mind and with NetDocuments (ND) being a cloud-first provider with decades of experience, a proof of concept (POC) of NetDocuments was conducted. This involved a structured testing programme of all core elements by system users from all levels – business support and legal, and from partner to secretarial level. The POC was successful and this was followed by a further three months of rigorous due diligence process ending in WS' decision to implement NetDocuments.

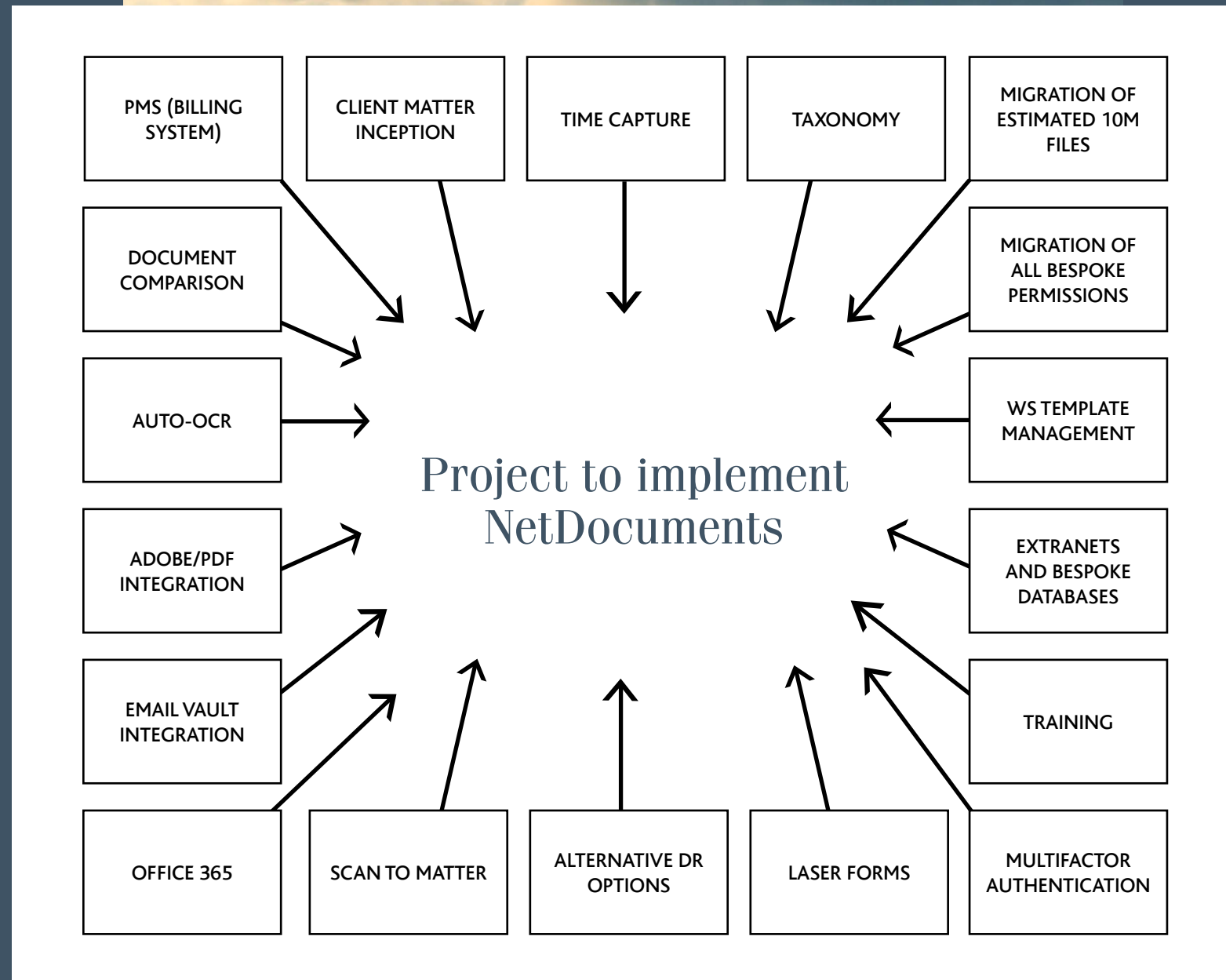
OVER TO THE CLOUD:
GOING BEYOND A DMS IMPLEMENTATION

A Marathon Not A Sprint

There were few UK-based ND partners to choose from at the time so we enlisted the help of our procurement consultant Baskerville Drummond Consulting Limited (BDCL) to assist us with the project planning and implementation. By the time IT was ready to embark on the project, BDCL found an experienced ND implementation partner who would help us implement and migrate millions of files over to ND with one of the team members also undertaking training to become a NetDocuments Certified consultant.

Internally, the marathon planning began with the WS IT DMS project team looking at the various applications that had to work with NetDocuments and all the possibilities for further automation in order to leverage the technology.

With in-house ND REST-api skills gained, the WS Template Management System was revamped and simplified to work with ND as these already integrated with our PMS (time and billing system), minimising the cost of using and integrating yet another product and providing us with more control over workflow enhancements.



A webpart was also developed in-house in order to provide matter-based KPIs which not only showed information from our PMS/billing system on the DMS workspace but also from our compliance systems including any unreleased time from the Intapp Time Recording system. WS already has numerous compliance alerts, but these are primarily Fee Earner based. With users in and out of the DMS, this provides visibility and transparency across all fee earners working on a particular matter which also encourages better matter management.

Internal tools were also created to monitor ND matter workspace creation in the cloud and automatically apply any relevant bespoke security permissions as part of the client matter inception process. All other internal bespoke database systems were also updated to work with NetDocuments. The team also tested ND's integration with Office 365 and 2-factor authentication solutions as part of our phase 2 implementation plan.

A training programme was developed and we had 99% uptake and attendance. From project kickoff in February 2017 to go live date in December 2017, this wasn't a sprint, but a marathon involving intense project planning, coordination, coding, testing, training and a lot of project communication.

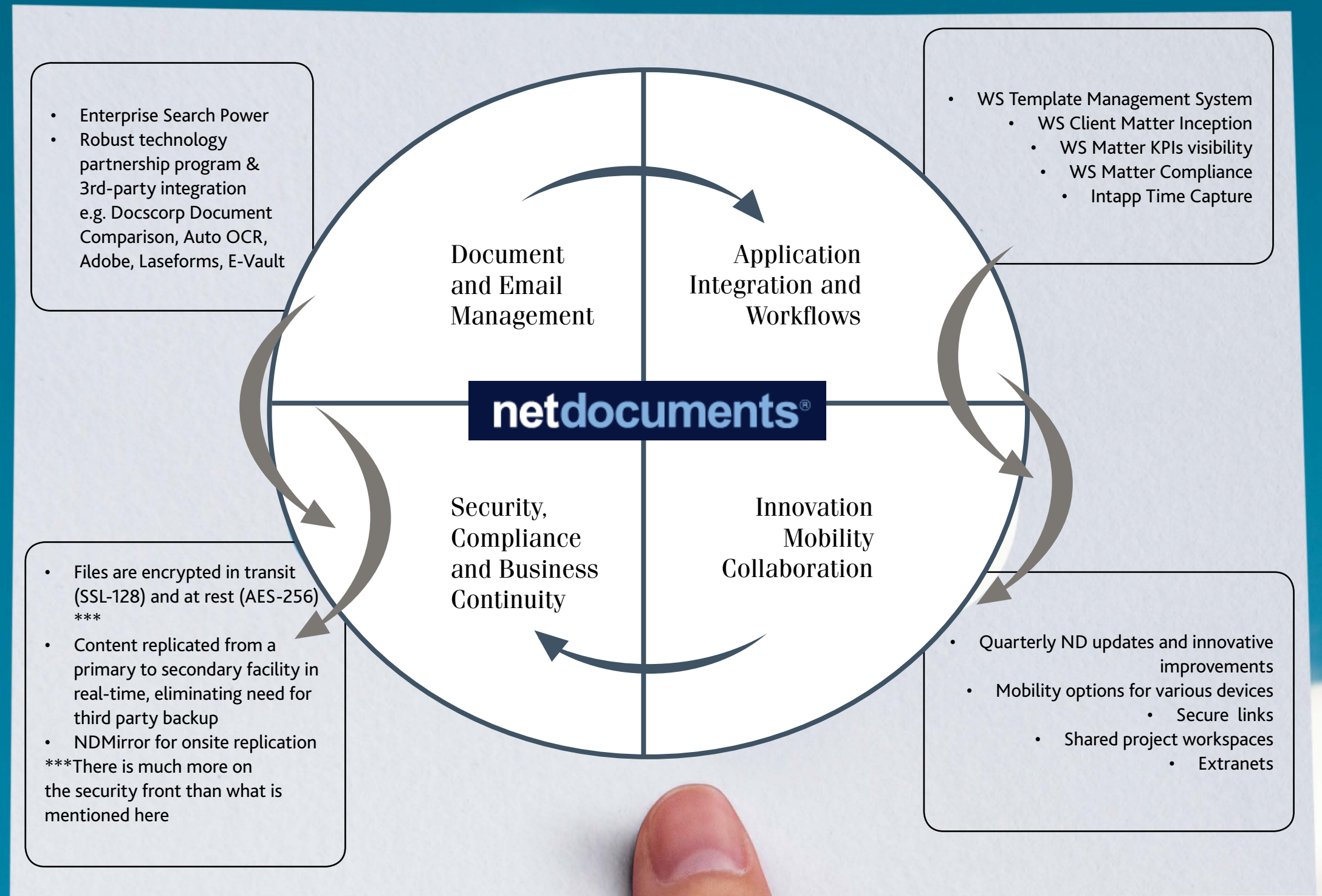
Key to this project success was senior management support. IT had the necessary tools and resources to focus on the project, bearing in mind other continuing demands on IT resources; the team even rolled-out speech recognition to legal teams two months before going live with ND.

The Result






A Document and Email Management Service that encompasses it all – Compliance, Security, Reliability, Visibility and Scalability

With the flexibility, built-in features and power that comes with NetDocuments, we are able to provide a solution that is more than just a Document Management System in the cloud. It is only a month after we have gone live, but it has already accelerated positive changes in working practices.

Having a solution provider who is committed to continuous product innovation, world-class security and customer success, and hands-on consultants who demonstrate the same commitment shared by the IT Team in achieving WS' project goals, the overall team effort and hard work has helped to deliver a seamless transition for the business from an on-premises solution to the cloud.



As with any project of this magnitude there will always be challenges and snags, but the overall end game does not only help us meet the above objectives. The overall end product enables us to:

-  Reduce risk and liability by improving regulatory compliance – WS inherits and benefits from NetDocuments’ ISO compliance. ND are ISO 27001 compliant and more recently, ISO/IEC 27018 certified. This means adherence to a set of standards to protect personally identifiable information (PII) and is for us a step forward to GDPR preparedness
-  Meet clients’ increasing demands for tighter security, innovation and secure collaboration
-  Provide built-in disaster recovery
-  Reduce infrastructure and software upgrade cycles and maintenance allowing IT to focus on other projects that add value to client service
-  Provide a modern user interface with an integrated matter workspace enabling invisible technology adoption. This is reflected in the feedback we get from our lawyers

“I am generally very happy and impressed with the NetDocuments system. I find the search function quite user-friendly and like the different areas/types of things that you can search in. In particular, I like the key documents section and find this very helpful on certain matters for organising the file. I also find the box showing the WIP and unpaid bills for the file very useful.”

Claire Hance-Lambie, Senior Associate, Real Estate



OVER TO THE CLOUD:
GOING BEYOND A DMS IMPLEMENTATION

The Future

This implementation is but part of a wider and dynamic digital transformation strategy, and as with most organisations, one has to continuously adapt to a fast-changing technological landscape. We need to create and improve our existing capabilities and leverage opportunities brought about by new technologies and their impact in a more innovative way.

WS prides itself on providing market leading advice across a broad range of sectors and this implementation demonstrates part of our continued efforts to deliver a first class service to our clients. With an exciting NetDocuments roadmap ahead, WS is looking forward to reaping the benefits of better business agility and more actionable intelligence from growing data and information stored within the NetDocuments system.



CHRISTEL AGUILA
Head of IT, Partner

