

# Leveraging cloud technologies to effect business change

Neil Davison provides examples of the benefits experienced by Farrer & Co when they changed the way they used technology in the firm

**F**arrer & Co is an independent law firm with a 300-year plus history advising clients on legal matters. The London-based law firm serves private individuals, charitable institutions and corporations and today has 400 staff including 163 fee earners and 77 partners.

Although the firm's legal legacy is steeped in tradition, our IT leadership has focused on taking a proactive approach when it comes to technology, while keeping an eye on key areas of technology transformation, including mobility, on-demand IT as well as overall consumerisation and cloud computing. The firm remains leading-edge in terms of our ability and willingness to implement new

technologies and more importantly match new technologies and processes with the firm's big picture strategy and business objectives. The firm's commitment to adopt cloud computing as well as push forward on

---

**Once we made the commitment to embrace not only technology but process change, we realised that this would require a philosophical shift**

---

an ambitious 'paper-light' approach as part of a broader electronic-filing (eFile) initiative is a recent example of such business and technology transformation.

#### **Traditional technology challenges, modern solutions**

Law firms are document heavy and traditionally produce vast amounts of paper which has to be retained for a significant number of years, depending on the specific records management policy. With the unprecedented growth in email usage, the firm's paper and electronic storage has also been growing, making adequate management cumbersome. Lots of firms change their document management system



and our decision to seek a new solution was motivated not only by the inadequacies of the old system but by the promise of increased agility, mobility, flexibility, business continuity and security enabled by a native cloud-based electronic document management (EDM) technology. We looked at our document and paper workflows, including a thorough review of how the business functioned and flowed to date, and decided to initiate an electronic File project including a new EDM as well as scanning and imaging technologies to address reducing paper clutter by changing business processes and introducing new IT solutions.

The firm decision to change 'technology as usual' was inevitable, and based on

previous success with mission critical technology initiatives, we had confidence in firm leadership support and buy-in. We were in dire need of a modern document management system, and at the same time realised that our physical paper storage volumes were extremely high and needed to be addressed. The initial question of 'what are we doing with our EDM?' turned into 'why are we storing so much paper?' which turned into 'how can we improve document related work flow and increase overall productivity?'

#### **A keen eye on mobility**

Mobility in the law office is a common theme and of particular importance at

Farrer & Co. Currently, 70 per cent of the firm's workforce prescribes to a flexible working model, with more than 20 per cent making up the core of regular flexible home workers. With this in mind, the management board felt very strongly about technology that would support this flexible remote working strategy encompassing 24/7 system availability and remote access. With a cloud solution like NetDocuments, our mobile workers have been able to access their documents, files and emails remotely, accounting for a critical component of the firm's communication network. Moving forward, we are looking at further improving firm telephony and video conferencing solutions.

**Change management**

Once we made the commitment to embrace not only technology but process change, we realised that this would require a philosophical shift of how the firm approached a 'less paper', 'more process' and 'optimal technology' reality. We also had to look at what it meant to fully embrace cloud computing. Would the firm jeopardise security, one of our hallmarks, when switching to a cloud environment? How could we balance security and the usability of a cloud DMS system? Added to these challenges was the fact that Farrer & Co was the first large UK law firm to implement and roll-out a cloud solution as critical as document management, providing no best practices or lessons learned from peer firms.

Making the switch to NetDocuments was part of a critical process change initiative which gave us the chance to revisit our existing paper-based policies and workflows and analyse how we would work in a digital environment. This led us to review existing paper and scanning processes and how we could move to a paper-lite environment. The broader electronic file project connects our cloud-based DMS as well as our digital scanning workflows and develops document creation and handling standards that free up time for our staff to work on more strategic initiatives.

**Our decision to seek a new solution was motivated not only by the inadequacies of the old system but by the promise of increased agility, mobility, flexibility, business continuity and security enabled by a native cloud-based EDM technology**

We undertook a large amount of business analysis because we knew we were making significant changes to the way people worked with files. Our business

analysts went out into the business and understood how people worked with paper files. Once we had that information, we could start to think about the look and feel of NetDocuments and how we could replicate a paper file on screen.

**The management board felt very strongly about technology that would support this flexible remote working strategy encompassing 24/7 system availability and remote access**

**All-in buy-in**

Having executive and firm-wide, role-based support and buy-in was critical as part of the NetDocuments EDM evaluation as well as our broader eFile initiative. The firm has a long, successful history of vetting key technology projects and decisions via group review and consensus. In this case, we assembled an 11-member project board consisting of IT, firm partners, solicitors and secretaries tasked with not only outlining the broader firm technology strategy but also conducting a formal review and selection of the new technologies. In the case of the EDM, this included reviewing RFPs and evaluating solutions from six different suppliers over the course of a five-month time frame.

Education throughout the evaluation, selection and implementation process was critical to further buy-in and making sure the project board was on the same page and able to champion the project within the rest of the firm. With that said, we made sure the partners and fee earners were comfortable with the concept of cloud computing and provided as much information and tutorials as needed. We were pleasantly surprised by the enthusiasm about the cloud and the willingness of our project board to espouse their cloud knowledge to their colleagues. This 'team spirit' really is a big part of Farrer's engaging and collegial firm culture. There's a fundamental understanding that IT systems, beyond their technology

attributes, are in essence business systems that impact the business of lawyering.

**Training success**

As mentioned earlier, firm culture played a critical role in the overall success of our EDM and broader eFile initiative. This culture especially came to light when it was time to train our employees on the NetDocuments EDM switch over and complete eFile migration. Bearing in mind that we would introduce major change management alone in switching to a cloud environment, we planned accordingly and spent five months before the 'go live' date educating the firm on the transition. In total, we hosted 25 sessions for all firm users explaining the new workflows and business of the eFile initiative as well as cloud eDMS and NetDocuments basics. We wanted firm users to have a certain comfort level with the new processes and technologies before starting targeted training. In addition, we worked with our outside digital agency to develop a separate communications plan focused on the roll-out. We were able to clearly and emphatically communicate the benefits, changes and overall value of the new eFile initiative. As a result, we had an informed and enthusiastic user base ready to embrace the switch over.

**A move to the cloud has provided additional, sometimes 'invisible' improvements in terms of everyday working**

Approximately nine months after the eFile project kick-off, the firm went live with a 'big bang'-style migration to the new eDMS and scanning and imaging technology. On a Monday morning, we introduced our new way of working to 400 people across the firm and have not looked back since. In the beginning, we offered one week of training combining 90-minute classroom training sessions – and an intricate floor support strategy. In order to answer 'on the go' question for users as they came up, we brought in floor walkers to supplement the NetDocuments



and IT staff. The team of 20 floor walkers had been trained concurrently with firm users so there was a level of familiarity. Spreading them out among the various floors gave our users access to expert trainers when they needed them and took pressure off the service desk. After our initial two week training, we offered NetDocuments reinforcement training approximately eight months later to address more detailed and workflow-specific questions.

---

## We wanted firm users to have a certain comfort level with the new processes and technologies before starting targeted training

---

### User benefits and business results

The firm's fresh approach to electronic filing has produced big dividends. Farrer & Co has changed its ageing document management software and implemented the latest native cloud technology, which is easier to use and allows both lawyers and clients access to their files from any location using any internet-connected device. This greater flexibility and sharing of information means a radical change to how our lawyers and staff work day to day with enhanced services delivered to clients.

### Business continuity

A move to the cloud has provided additional, sometimes 'invisible' improvements in terms of everyday working. Last year, an electrical fire caused a mass power outage in our London offices, and while the IT team worked to restore office systems, firm lawyers continued to access files electronically through the cloud. This proved that the cloud actually helps mitigate risk versus, as long assumed, creating more risk and security imbalances. While there was a lot of work internally at the firm to prove that going with the cloud was safe, the real life disaster recovery example showed that we could not only keep working safely but without any interruptions.

### Security first

Overall, delivering security and compliance in the legal technology space requires not only an expertise and incredible attention to detail, it's also imperative that the vendors create solutions that are agile enough to adapt to changing regulation and market factors. As SaaS software evolves and improves through periodic releases, the security and compliance measures should keep pace with the ever-improving software and delivery model. Farrer & Co prides itself on trust and client confidentiality. Security is the key to everything we do so it was mission critical that our cloud technologies and other systems uphold the same if not higher security standards.

Because NetDocuments works with some of the largest and most prestigious law firms, financial institutions, and global corporations, the levels of security and compliance exceed the current global standards, and innovation occurs at such a high rate that a single firm like Farrer could not achieve the same security standard on its own. Some of the additional measures where NetDocuments is exceeding global security standards which benefit our firm include cryptography, and flexible and private storage options as well as various compliance certificates including ISO 27001.

In addition, the new NetDocuments system means information security and disaster recovery processes have been improved with IT management overhead and costs reduced.

Eliminating significant volumes of paper as well as the efficiencies gained by a cloud infrastructure also translates to substantial savings in IT infrastructure and off-site storage as well as removing the necessity to manage a complex on-premise IT environment, freeing staff to focus on work considered more strategic.

Overall, the firm's eFile initiative has been a massive business and IT change initiative spanning several areas:

- **Business analysis:** mapping and review of how the existing paper-based process would work in a digital environment.
- **EDM system replacement:** selecting and implementing a legal-specific native cloud-based solution after reviewing seven competitive systems based on firm needs.
- **Business and technology training:** delivering initial training for over 400 staff, covering process changes and

how to work with scanned documents and the new EDM.

- **Communication and enhanced support around roll-out:** delivering regular communication to the business, before, during and after roll-out. The team also engaged and trained 20 floor walkers on short-term contracts to work with staff on each floor to help with queries about the new EDM as the system went live.
- **Scanner selection and implementation:** working with reputable third parties to implement the best capture and scanning solution to meet the business' needs. Since the new scanners have been installed, scanning throughput volumes have increased 25 per cent.

---

## The firm decision to change 'technology as usual' was inevitable, and based on previous success with mission critical technology initiatives, we had confidence in firm leadership support and buy-in

---

### Futures

Based on our overwhelmingly positive experience with our EDM and e-File initiative, Farrer & Co will continue to pursue a 'cloud first' strategy when it comes to new technologies and services.

We're adding more and more software to the cloud, which means that our lawyers will be able to do pretty much everything, from anywhere, on a phone or a tablet. Lawyers already have cloud access to emails, calendars, dictation software, time-recording applications and electronic filing. The firm also plans to roll-out Microsoft Office 365 next year in order to provide on-the-go access to enterprise productivity applications.

*Neil Davison is IT Director at Farrer & Co (www.farrer.co.uk)*