

# Our DMS in the Cloud: In Support of IT Standards and Simplicity



by Paul Bromwell

Law firms are here to provide legal services to clients and make an acceptable profit for their owners. IT services are purchased and provided as a necessary support mechanism. In many firms, decisions on how technology is implemented and configured are based on internal knowledge and opinions or on outside consultants who bring their particular knowledge and opinions.

If the firm is fortunate to have people who are good at this, the purchased technology can work well. But factor in employee turnover, continuous rounds of technology refreshes, change management (or lack thereof), delayed software upgrades, self-inflicted wounds, mystery issues and years like 2009, and the value picture gets very muddy.

Meanwhile, while we have different practices and clients, the core requirements of most firms are very similar, *i.e.*, good performance, quality mechanisms for authentication and access control, higher quality of service for video and telephone, reliable internet access, email, document management, Microsoft Office, private and public Wi-Fi access, and appropriate security controls and auditing. For the items we all need (upwards of 95 percent of the total), is it necessary to come up with our own ways of providing these

services? Do we all need to reinvent the wheel? Why can't we buy these services based on standards?

Frost Brown Todd's (FBT's) perspective on technology and modern law firm operations has recently been put on display as part of the firm's transition to the cloud, from an on-premises document management system (DMS) to the cloud-based NetDocuments. This switch has given me new insights regarding firm IT strategy and best practices.

## Proof of Concept

Our firm has been working to implement technology that gets the firm out of the business of creating and maintaining complex technology initiatives. Six services we leverage that are on the right track include security monitoring, help desk, Office 365 with Exchange Online, litigation services, facilities management services, and our native cloud DMS.

The question of value of a new technology is always a somewhat muddy proposition. Many factors, beyond dollars and cents, come into play — tenure and skills of the staff, overall strategic outlook, point in the upgrade continuum, and so on are all significant. I try to look at value over the long run. Factor in cost avoidance (future upgrades and refreshes, staff savings, redundancy and disaster recovery savings, ongoing maintenance costs), and then look at the value of additional benefits provided by the new solution.

## DMS Value Proposition

After extensive due diligence, we selected NetDocuments for our firm's transition to a cloud-based DMS. Here's why:

- » It fit FBT's model and modern approach to technology.
- » We had a substantial on-premises DMS consolidation and upgrade in front of us (eight million documents and 25 servers), so we required an "industrial strength" solution.
- » We had 20 percent penetration in the use of matter workspaces, but we wanted 100 percent.



- » The on-premises DMS was unreliable and a big cause of firm Outlook issues.
- » The on-premises DMS was difficult to maintain.

While the cost and complexity analysis of staying on our current system versus the cloud was an important part of the firm's due diligence process, the NetDocuments platform presented many compelling reasons and value propositions we couldn't ignore.

Key benefits included:

- » **Built-In Security and Compliance:** ISO 27001, SOC 2 Type 2, SOC 2 Type2+, SEC, FIPS 140-2 Level 3 and HIPAA are built into the system
- » **Centralization:** All documents are imported and hosted in a central document management library, which enables a single library for everyone in the firm
- » **Universal Matter Workspaces:** The system provides a central matter workspace for every matter without third-party tools
- » **Enterprise Search:** All documents are full-text searchable
- » **System Configuration:** Configuration is simple and straightforward
- » **Secure Web Interface:** There is no need to use a virtual private network (VPN); content is accessible from any browser, any device, any time
- » **Microsoft Office:** Integration within MS Office applications with ndOffice is seamless
- » **High Level of Security:** The technology infrastructure goes far beyond what most law firms can achieve themselves
- » **Disaster Recovery and Business Continuity (DR/BC):** DR/BC are built in across redundant world-class data centers

- » **Integration:** Third-party application integrations and open application program interfaces are available
- » **Email Management:** The tool includes next-generation predictive and mobile email solutions
- » **Mobile Client:** Access documents via a native iOS iPhone and iPad app or Android devices via WebDAV
- » **Encryption:** All content is encrypted in transit and at rest
- » **HIPAA-Compliant:** The tool meets HIPAA requirements for privacy and security
- » **File-Sharing:** Secure collaboration and extranet functionality are built in
- » **Reputation:** NetDocuments is a well-known organization with dedicated owners and staff who are passionate about providing a quality service
- » **Reduced IT Footprint:** We could eliminate the document management infrastructure
- » **High Availability:** The system has a high guaranteed uptime (99.9 percent per the service-level agreement)

### Standards and Simplicity

From a strategic technology perspective, the firm operates on the notion that the days of customized general IT services at law firms are coming to a close. It may take some firms 20 years to get there, but it is clearly the future for IT in law firms.

As law firm IT operations, are we so different that our way of doing things requires everything to be "our way"? Standards and simplicity in one area can result in standards, simplicity and less cost in another. Following this mindset — even for highly involved, mission-critical applications like your DMS and email management — is an important ingredient to success. **P2P**



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