

# netdocuments® CASE STUDY

## CARBERT//WAITE LLP

USERS: 50

OFFICES: 1

CUSTOMER SINCE: 2022

*Interview with Dylan Snowden, Partner at Carbert Waite LLC  
on the firm's journey to NetDocuments*

### PRODUCTS



ORGANIZE

- Document Management
- Email Management
- OCR • DocuSign



PROTECT

• ndFlexStore



DELIVER

- CollabSpaces
- SetBuilder

## How Moving from Worldox to NetDocuments Enabled Better Experiences, New Possibilities for a 50-Lawyer Firm

### About Carbert Waite

Carbert Waite LLP is a midsize litigation law firm located in downtown Calgary, Alberta, with additional expertise in health law, employment law, mediation/arbitration, estate planning, and business law matters. The Canadian firm is known for providing clients with trusted insight and innovative solutions.

In late 2022, the firm made the switch from the on-premises Worldox document management system (DMS) to the NetDocuments cloud platform. Here Dylan Snowden, Partner and Executive Committee member, shares insights into the firm's journey.

### A Culture of Thoughtful Innovation

When you want to maintain the absolute highest level of security possible, you tend not to push forward with innovations in technology until all risk factors have been addressed. Part of staying knowledgeable is having open dialogues with other law firms.

"We are actively engaged in conversations with other firms, talking to people to **find out what tech they are using, what they think about it**, and what changes they would want. This helps us take a thoughtful, strategic approach to innovation that factors in the levels of security we require," notes Dylan about Carbert Waite's culture.

The firm was experiencing increased frustrations with the stability of their on-premises Worldox DMS and the inability to access documents wherever and whenever they needed them, which prompted their decision to begin looking at alternative options.

## Business Goals and Evaluation Criteria

Carbert Waite had already begun shifting to the cloud by implementing Microsoft 365, and their practice management and accounting software had moved to a cloud suite.

Explains Dylan, **“Maintaining on-premises hardware is a big capital expense.** You get to depreciate it for a few years and then you’ve got another big capital expense. So moving to a cloud DMS was certainly something that was of interest to us as part of our overall IT roadmap.”

Carbert Waite asked other firms about their moves to cloud DMSs and learned from those experiencing success. **Beyond security being of high importance,** a few important factors that Carbert Waite was looking for in a new document management platform included:

- Potential for improved efficiencies and streamlining the firm’s profiling process
- An intuitive user interface that makes the tool easy for people to use
- Accessibility through mobile devices

Dylan added, “We had **two lawyers who used NetDocuments at previous firms who provided rave reviews,** so between that and our due diligence against our goals and criteria, the decision to select NetDocuments was actually pretty easy.”



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## Plans for a Successful Rollout

To help maximize adoption of NetDocuments, Dylan and the team developed a change management approach that included a pilot group, purposeful training, and firmwide communications.

**“Running a pilot phase was really useful,”** says Dylan. “It essentially created another set of ‘trainers’ that could help the rest of our team with questions. Overall, we wanted to provide people with the tools they needed to be successful on day one and beyond, so we set up **lots of opportunities for training, Q&A sessions** with the trainer, and then more training to continue to develop skills.”

The firm also partnered with an experienced implementation partner to help them through the launch. Notes Dylan, "Craig Bayer from Optiable was so knowledgeable. He was instrumental in getting us up and running."

## Carbert Waite is Now Experiencing Quick Wins with NetDocuments

Just three months after implementation, Carbert Waite is already seeing positive outcomes from moving to NetDocuments. Highlights include:

- **Powerful search makes finding documents easy:** "People are profiling their documents and then finding them when they search for them," says Dylan.
- **New opportunities for flexible remote work:** Dylan explains, "That mobility piece, the ability to work remotely, not tied to a remote server — that has been a big improvement for our remote work."
- **Support that delivers:** "NetDocuments support has always been fast and excellent from both a user and administrative perspective since day one. We were told it would be good, and it has been," shares Dylan.

## Future Projects on the Horizon

Carbert Waite has several projects in the works as they look to elevate their use of the platform. A focus on [CollabSpaces for external client collaboration](#) is a top priority, and Dylan has experienced success with SetBuilder and is encouraging others to use it. He shares, "Having the [SetBuilder tool](#) within NetDocuments and being able to build those binders without leaving the DMS has been really helpful. I don't have to copy anything over to another tool and then bring it back and reprofile it all. It's all done in NetDocuments. **SetBuilder has been a great tool I've been using for briefs, trial preparation, and mediation preparation.**"

The firm also envisions the mobility piece will organically expand as more people are using NetDocuments and becoming more familiar and comfortable with its capabilities.



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