

netdocuments® CASE STUDY



BURKE, WARREN,
MACKAY & SERRITELLA, P.C.

A full-service Chicago law firm representing clients nationwide

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PRODUCTS



ORGANIZE

- NetDocuments
- ndMail



PROTECT

- Customer Managed Encryption Keys (CMEK)

Big Journey, Bigger Rewards

ABOUT BURKE, WARREN, MACKAY & SERRITELLA

A law firm with deep Chicago roots, the highly-qualified and experienced team of Burke, Warren, MacKay & Serritella serve a variety of clients, ranging from individuals to closely held businesses to publicly-held companies, and from not-for-profit entities to governmental bodies — across the country and around the world.

IN SEARCH OF USABILITY AND SCALABILITY

After ten long and often frustrating years with their previous document management system (DMS), law firm Burke, Warren, MacKay & Serritella knew it was time for a change.

“Ease of use and scalability were the biggest benefits we were searching for in a new DMS,” said Anthony Moore, Burke Warren’s director of IT. “We’ve had a lot of issues with our previous systems, and we really wanted a system that we could grow with but was also easy to use and manage.”

In particular, the Firm was looking for a cloud-based system that would be easy to administer for the firm’s 70 attorneys and over 50 administrative personnel — without having to bring in extra manpower or expertise to manage it in-house.

“One of the biggest things that stood out with NetDocuments was that the system was cloud-based,” Moore explained. “At the time, we were looking to move a lot of our systems to the cloud, and NetDocuments was ready — but a lot of the competitors weren’t.”

On top of that, NetDocuments met the team’s requirements for usability and scalability. “It’s a very intuitive system,” Moore said. “Just how easy it was to administer and use NetDocuments really jumped out for us in making the decision.”

A CHALLENGE WORTH OVERCOMING

Although they were committed to making the journey towards a modern DMS, the team still experienced some apprehension as they approached the transition from on-premises document management to a cloud DMS. It was going to be a big shift, with a lot of documents and metadata to transfer between systems.



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“It had been a very long time since we’d embarked on a project like that,” Moore admitted. “So there were some very normal fears and concerns. *Would everything come over? Would everything be legible and accessible? Would security come over?* Things like that.”

Despite these concerns, the team felt confident that the switch would be worth it.

“Security and data integrity — those were two things that NetDocuments handles very well, in my opinion,” Moore said. “So the risks and concerns we had were far outweighed by the rewards of NetDocuments having systems that made sure all of the documents and data came over accurately and completely, as well as the security features that were in place. It really put us at ease.”

HANDLING IMPLEMENTATION WITH FINESSE

To assist with implementation, Burke Warren enlisted the help of Keno Kozie — a trusted managed services provider also based in Chicago.

“They had a very, very strong team,” Moore said. “Their engineers brought a wealth of knowledge regarding both NetDocuments and the system we were transitioning from. They were very on point.”



K E N O
K O Z I E

Through careful preparation, Burke Warren and Keno Kozie pulled off a strong platform rollout with the team. As a result, adoption has been remarkably strong throughout the firm.

“The biggest surprise once we made the transition was how easy it was to use the system right off the bat,” Moore said.

“During the implementation and migration, we had on-site trainers from Keno Kozie that helped out tremendously,” he continued. “Since then, we’ve offered one-on-one training and one-on-many training. We’ve gotten documentation from NetDocuments and have even had calls with NetDocuments product specialists to help us along the way.”

And their concerns about the document migration? Completely resolved.

“Another big surprise was the amount of documents that came over accurately and completely,” Moore said. “We didn’t have to do a lot of subsequent passes to transfer data after the initial one or two transfers.”

Now that the platform is fully implemented with the firm, Burke Warren uses NetDocuments as its complete document management solution — both for clients as well as for internal administrative departments and practice group documentation.



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REAPING THE REWARDS OF A TRUE-CLOUD SOLUTION

For the Burke Warren team, NetDocuments has raised the bar of what document management can and should be. Here are just a few of the ways this firm is getting rewarded for their journey to the cloud:

SEAMLESS DAY-TO-DAY USE

“I think one of the biggest things that NetDocuments has helped with on the day-to-day is not having to maintain and administer the on-premises document management

system,” Moore said. “Those systems have a lot of servers, a lot of databases, a lot of moving parts and things that can go wrong... and that’s not even counting the disaster recovery aspect!”

But it’s not just the technical side of things that has the firm exhaling a sigh of relief.

“From the people perspective, there’s a lot of different ways you can use NetDocuments, both from browser compatibility to different applications that you use. And then even when you have to manually upload documents into NetDocuments, it’s a very seamless process.”



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THRIVING THROUGH A GLOBAL PANDEMIC

“Going remote during the pandemic, it would have been a nightmare had we still been using an on-premises system for our document management,” Moore said. “NetDocuments made the process of going 100% remote so much easier. The cloud-based system just started to pay off even more at that point.”

While security is always a top concern for law firms, Burke Warren didn’t have much added stress when their team began working from home.

“Security and accessibility are things that NetDocuments already had built-in,” Moore explained. “We really did not have to make many adjustments at all from being on-site all the time to going remote. We already had the security and the access built in to make it secure and easy to use for our environment.”

That sense of ease has extended to the way the team shares documents, collaborates on them, and shares them externally.

EXCEPTIONAL INTEGRATIONS

“There’s nothing so far that we’ve come across that doesn’t integrate with NetDocuments,” Moore said. “Whether it’s the Office Suite email, Office 365, Microsoft Teams, and the cloud-based portions of those — those integrations with third-party solutions really stand out with us.”

GOING INTO THE FUTURE WITH 20/20 VISION

Moore readily admitted that the firm was initially hesitant about making the journey to a true-cloud document management system. But they changed their tune.

“NetDocuments has become one of our strongest cloud partners and applications that we use,” he said. “NetDocuments is at the center of our entire document production, regardless of practice group, regardless of job function.”

Today, they’re grateful they made the decision they did — and *when* they did.

“We wouldn’t have been able to continue to provide good IP services around document production, and we *certainly* wouldn’t have been able to go remote as quickly as we did last year without having NetDocuments at the center of our client documentation, and of our document management system strategy overall.”



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“I’d have to say that we’re very pleased and we look forward to continuing our adoption and usage of the platform,” he explained. “What’s next on the horizon for our company is actually trying out new features and new offerings from NetDocuments.”

(One feature he can’t wait to use? Workspace Security Manager. The tool helps system administrators manage NetDocuments security policies with ease and apply them at a workspace level with zero coding—further streamlining management of the software. “That’s pretty much a no-brainer as far as using it and getting the benefits that come along with it,” he said.)

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So what are Moore's parting thoughts on the journey?

"My advice to anyone that is considering NetDocuments would be first to look at their competitors," he says. *"What I think you will find out is NetDocuments' features, accessibility, and integrations in the various systems and third-party applications are second to none."*

ABOUT NETDOCUMENTS

NetDocuments is the **leading cloud-based document and email management solution** to securely store and organize documents on a single platform. Backed by **20 years of experience in cloud innovation**, **over 3,220+ companies worldwide trust NetDocuments** to secure their data while increasing productivity and team collaboration.

Make the move to the NetDocuments cloud to get the speed, mobility, and industry-leading security companies worldwide are already taking advantage of.

Visit www.NetDocuments.com or call us at **(866) 638-3627** to learn more today.

