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CASE STUDY

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Adopting Cloud DMS Amid a Global Pandemic

ABOUT CLARO & CIA

Headquartered in Santiago, Chile, Claro & Cia. is an undisputed leader in the Chilean legal market and the country's Lex Mundi exclusive member firm. With around 100 lawyers and 70 additional staff, Claro is among the largest firms in Chile.

TRANSITIONING TO THE CLOUD

Although cybersecurity should be a major priority for law firms, it is not always given the treatment it deserves. But Claro gave it the highest priority by creating a partner-directed committee dedicated to finding IT solutions to meet Claro's technology needs. As one of the largest firms in Chile and exclusive member firm of Lex Mundi, Claro has the highest standards of quality and security protocols, and as a result dedicated to this project unrestrained resources and partners' support.

When it came time to either renew or replace their in-house infrastructure in 2019, Claro decided to also explore other options. After almost one year of work and analysis with its IT Committee, they came to the conclusion that switching from an on-premises data center to the cloud was the right decision. Amongst many available options, they chose to adopt the Microsoft 365 environment with Advanced Threat Protection and a private cloud, bringing almost all of their systems into the cloud

through that transition (including the DMS they were previously using). “With the right implementation, cloud computing proved not only to be the natural decision in our search for state-of-the-art digital platforms, but also a very powerful tool to better serve clients and ensure a more fluent interaction among our teams. Though not foreseen at the time, the decision was very opportune in the midst of the COVID-19 pandemic, and has enabled us to transition through the crisis in better shape, closer to clients in spite of distance, and with professional connectivity seamlessly in place,” stated José María Eyzaguirre B., chairman of the Firm.



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Chairman, Claro & Cia.



CHOOSING A CLOUD-BASED DOCUMENT MANAGEMENT SYSTEM (DMS)

One major system at Claro still needed to be brought fully to the cloud: the DMS. “It wasn’t a feature we were particularly proud of to migrate into our private cloud,” says Ariel Mihovilovic, Claro’s partner specially appointed to be on the IT Committee. “It wasn’t broken ... but we wanted to improve user adoption at the same time we were increasing cybersecurity features.”

As with any major system change, it is easier said than done. “We were working with the former DMS for 15 years, so of course it was a big challenge,” says CFO Cristóbal Guzmán, who also participates in Claro’s IT Committee. Between a poor user experience and difficult VPN connections, user adoption of the previous solution had been limited.

After being introduced to NetDocuments, the Claro team was instantly impressed with the platform’s excellent cybersecurity features, as well as the user experience and high

level of personal service they received from NetDocuments. “The sales team made us feel really special and treated us as an important client, as opposed to [other solutions], where our impression was that we were just another customer,” said Mihovilovic.

Despite the excellent initial impressions, Claro wanted to be sure of their decision.

To ensure buy-in across departments, the IT Committee hosted open demonstrations and workshops with selected members of the Firm, comparing the features of NetDocuments against iManage and the newest update of their existing DMS solution, eDocs. After spending several weeks in this process, workshop participants were surveyed on their preference.



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Ariel Mihovilovic
Partner, Claro & Cia.



NetDocuments came out the winner, with users drawn to the mobility offered by NetDocuments and the peace of mind they could experience with NetDocuments’ cybersecurity features. Additionally, having direct access to NetDocuments for support, rather than jumping through vendor support hoops, was another big plus.

COVID-19: INTERRUPTING LIFE, NOT IMPLEMENTATION

With the project underway in late 2019, Claro anticipated complete NetDocuments implementation by May 2020. Concern grew, however, as COVID-19 began spreading throughout the world early in the year.

Claro’s IT and executive committees met to discuss those concerns and how they might deal with the Firm working remotely to protect the health and safety of its members. *What do we need to do to be able to work 100% from home?* was the main lingering question.

Thankfully, the Firm's systems had already been transitioned to the cloud. The only outstanding obstacle to working normally was the existing DMS, which relied on limited VPN connections. But NetDocuments would completely solve that problem.

"In light of the coronavirus outbreak, our senior management requested to expedite the implementation of NetDocuments," wrote Mihovilovic in an email to NetDocuments.

Fortunately, the professional services team was up to the challenge. The implementation was rapidly accelerated, and the Firm's 140 users were able to receive training on the platform on a fully remote basis. As a result, while most businesses could have been scrambling to handle remote work, Claro did not miss a beat.



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Ariel Mihovilovic
Partner, Claro & Cia.



THE ICING ON THE (CLOUD) CAKE

Before going into the cloud, Claro relied on limited VPN connections to get access to their documents outside the office. In the midst of a global health crisis, this would have drastically impacted their ability to work remotely. However, because of their foresight in moving to the cloud—including their DMS—they easily avoided those difficulties.

"Because we made the decision of going to the cloud over a year ago, it was the icing on the cake to have our DMS fully in the cloud also," says Mihovilovic.

But it is not just Claro's IT Committee singing the praises of cloud-based work:

"I've been practicing law for almost 14 years," says Mihovilovic, "Nobody has ever thanked me as much within the Firm as they have been thanking me for the work we did in moving Claro towards the cloud. While the decision was mainly made for work flexibility and cybersecurity features, now, with COVID-19, we have an advantage over those who were not prepared."

Changing a DMS system can be challenging, especially when done amidst the largest pandemic in a century. For Claro, however, it was not a problem: the NetDocuments team had their back the whole way.



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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 2,750 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.

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