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LAWYERS

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## Cloud-First Technology for a People-First Organization

### About Coleman Greig

Established in Sydney, Australia in the early 1900s, law firm Coleman Greig has an impressive history — and with 20% year-on-year growth since 2016, they continue to be an innovative, progressive contributor in their community. The firm has also earned special recognition as one of the Top 50 Best Places to Work in Australia, and the only law firm in the top 25.

### Finding a Cloud-First Document Management Platform

After 20 years on the Worldox document management system (DMS), Sydney-based law firm Coleman Greig was more than ready for an upgrade. The system was far from user-friendly — its lack of agility hampered productivity and made collaboration especially difficult for the team. It wasn't the right fit for their people-first organization.

Warrick McLean, the firm's CEO, knew it was time to push a cloud-first strategy so that they could boost productivity, enhance collaboration, and support a flexible work environment.

"That flexibility of working within the cloud environment — anywhere, any time and on any device — was key for us," McLean said.

Sticking with Worldox wasn't an option. "We worked through where their roadmap was heading, and they just weren't going down the path of cloud," he explained.

As the team began to explore other options on the market, a leader emerged: “NetDocuments has been in the cloud since day one, and that says a lot,” McLean said.

But there were other key benefits that the team was interested in — especially given the unique circumstances caused by the pandemic.

“We wanted to move more to a collaborative environment,” McLean said. “Collaborating, not just amongst our team, but also amongst our client base, was paramount. We needed a DMS that would make it seamless.”



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Security on the platform was also a high priority: “Moving our DMS into the cloud, we wanted the security that NetDocuments provides,” explained McLean. “Outsourcing that to a company that handles security day-in and day-out was a no-brainer — especially for a firm of our size.”

NetDocuments’ user-friendly interface and tight integration with Office 365 and Microsoft Teams offered additional benefits for the team.

“In the end, the decision process wasn’t that difficult,” he shared. “The move to NetDocuments was unanimous.”

### **Delivering a People-First Technology Experience**

Rolling a new technology out to 166 users is never easy — but with an expert implementation partner and a user-friendly platform, Coleman Greig is accessing all of the benefits NetDocuments has to offer.

#### **CHOOSING A PERFECT-FIT PARTNER**

When it came time to implement the NetDocuments platform within the firm, McLean appreciated the opportunity to select their own partner.

“It was a positive experience,” he said. “There were many partners here in Australia we could have worked with, but ultimately we went with someone that was going to be a good cultural fit.”

"All the providers we spoke to that could roll out NetDocuments were fantastic in their own way," he said. "But every firm has their own unique personality and style, and the team we chose, [InPlace Solutions](#), has been great."

Throughout the implementation process, InPlace offered more than a standard rollout: "They were quite strategic in terms of getting us to think about things and challenging the way we had used our old DMS," McLean shared. This approach has allowed the Coleman Greig team to get the maximum benefit when establishing processes around the new DMS.

### **IMPLEMENTING AN EASY-TO-USE PLATFORM**

Coleman Greig and InPlace ensured they had a strong project plan for implementation across five offices with a combination of in-person and remote training. The process went well because NetDocuments is easy to use.

"In terms of our ability to pick up and run with stuff, our experience with NetDocuments has been good," said McLean. "From a user experience, NetDocuments is pretty intuitive so."

As a result, the bulk of the Coleman Greig team has been able to get on board quickly and easily.

NetDocuments' search capabilities are a particularly strong benefit for the team. "The way search operates in NetDocuments is more efficient than our previous DMS," he said. "It's more efficient, easier, and simpler."



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### **TAKING ADVANTAGE OF NEW FEATURES**

"With our previous DMS, we didn't have access to things like SetBuilder and other capabilities that NetDocuments has," McLean said.

Being able to pick and choose which features they wanted to add to their plan was a helpful approach. "For us, it's been a bit like buying a car. You can get the base model,

then you get the next level up and the next level and so on," he explained. "We haven't reached the top of the line yet, but we've been pretty happy with the features we've chosen."

"Obviously, the searchability has been an improvement on what we've had previously, and accessibility in terms of the opportunities to have stuff in the cloud is really exciting," McLean said.



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Warrick McLean, CEO, Coleman Greig



To ensure the team receives the full benefit of all these new features, the team has planned to do ongoing training rather than delivering a massive information overload initially.

"What we've always intended to do was to get people up and running - where the rubber hits the road is educating them on where the productivity gains are," he explained.

"We know there are some great productivity tools in the suite that we've acquired from NetDocuments. So, it's really about continuing to encourage and train our staff, especially as the platform continues to evolve," he continued. "We want to stay abreast of those changes and ensure we're keeping the troops up to date and continually challenging their thought processes."

### **Bringing the Cloud-First Vision to Life**

Though it's been less than a year since Coleman Greig began their NetDocuments journey, they are already seeing benefits across the firm, including high engagement rates and improved collaboration with clients.

"The ability to invite our clients into a secure workspace on NetDocuments and work collaboratively on a document is huge step forward" McLean explained.

But as CEO, McLean isn't just looking to solve the firm's current challenges, he wants to continue the firm's legacy of innovation, increase their agility and lead his team into the future. NetDocuments is helping him realize that vision.

### Attracting and Retaining Top Talent

With 60% of the firm's lawyers under age 30, McLean is particularly in-tune with the increasing age diversity in a younger workforce. "We think about our technology strategically and how it influences both the retention of our people and the attraction of talent," McLean said. "And people in the industry recognize NetDocuments as leading edge."

"NetDocuments has allowed us to not only focus on our people here and now, but also focus on our people and our clients well into the future," he explained. "It's a bit of a future-proofing strategy for us."

### CONTINUOUS IMPROVEMENT

McLean takes his role as CEO seriously: "I've always spoken about continuous improvement, but I really do think that if people in leadership roles aren't continuing to be better than they were last month, last year, or five years ago, they are not adding value to the organization," he said.

Bringing in new technology like NetDocuments is a key part of McLean's strategy for continuous improvement within the firm — and he does it with gusto.



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"Some of my team members often comment, 'Oh, Warrick, can you just slow down?' But I think that's part of my mindset. It's that you've got to continually improve, because if you don't improve, you will go backward. I'm a big believer in moving businesses forward," McLean said.

That mindset has paid dividends in McLean's time as CEO. "I think part of our success, particularly in the last six or seven years, is that people are energized by continuous improvement, particularly some of the younger staff, they like the fact that the firm continues to grow and it tries to be better."

With NetDocuments, McLean believes the future looks incredibly bright.



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"There's really a level of excitement for what's possible moving forward," he shared. "It's part of the reason we bought NetDocuments in the first place."

## 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 3,150 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](http://www.NetDocuments.com) or call us at **(866) 638-3627** to learn how more today.