

Inspiration From the Trenches >>>>



Discover how NetDocuments has helped Astraea Group, a law firm based in central London, transform the way expert advocacy and legal advice are delivered, ensuring that clients get the right solutions and best outcomes. In our conversation with **Nina Stewart — Fellow Chartered Accountant** and one of the firm's founding partners — we learned what makes NetDocuments an ideal fit for their team, which recently has been recognised by Modern Law Awards and Legal Innovation Awards.

What would you do differently if you were starting your firm over with a completely blank slate? That's the question Nina (and James Ramsden, Queen's Counsel and co-founder) asked when launching Astraea Group in early 2021. Free from the fetters of existing systems and processes, they've built everything from the ground up, and they intend to do it right from the start.

With the help of [Hoffbrand Consulting](#) and [Cloudfify Legal](#), Astraea Group have combined all-in-one practice management from [Actionstep](#) with NetDocuments' leading cloud-based document management system (DMS) to create a solid foundation for their firm.

And that decision is already paying off, notes Nina:

“Previously, I would have needed to ask someone for status updates on particular matters. Now, I can just go onto our system and look for myself. NetDocuments and Actionstep allow me to run reports and have full visibility into what's happening on each matter, which is great. **It's been hugely successful for us, and we are really reaping the rewards now.**”

See Everything in One Place

As a Fellow of the Institute of Chartered Accountants in England & Wales and a Chartered Tax Advisor, it's no surprise that Nina cares about the details. Having visibility across the firm is crucial to their success — and peace of mind.

Fortunately, with the integration of Actionstep and NetDocuments, Nina can easily keep tabs on all open matters without switching between tools or windows. Everything she needs is all in one place. Nina explains:

“We wanted to have a system that would allow us to see all matter details effectively, and the combination of Actionstep and NetDocuments has accomplished that. **We have one place where we can see everything related to a matter** — the time recording, the billing, and all the documents and emails associated with that matter. It's a robust, efficient system.”

A System that Grows with You

It's clear that Astraea Group has big goals for the future, and they're not going to let software limitations get in the way of their growth. That's one of the reasons they chose NetDocuments. The platform can scale to fit any size, from boutique firms to expansive global teams, which ensures they're future-proof.

“We wanted a solution that was right for the size of business we are now and one that could **grow with us, so we wouldn't have to change systems** in a year or two,” recalls Nina.

Find What You Need, When You Need It

One issue with other document management systems can be the ability for users to create their own folders and sub-folders. If someone else is trying to look at a matter folder after an individual has added folders, it can be difficult to follow the logic and find what is needed.

NetDocuments prevents that problem with templated folder structures (and strong search capabilities). In addition to keeping everything consistent across matters, Astraea Group has also found that it forces fee earners into the discipline of saving things in the right place. As Nina put it:

“One of the things that is really great about NetDocuments is that you have a cabinet structure that you can design and set per matter and replicate across every matter. **So if you’re going to look at a matter someone else has been working on, you know where to go and find what you need.** You know where to find the engagement letters, the witness statements, everything related to the matter — because it’s the same structure for every single matter.

Maximise Efficiency and Flexibility

You wouldn’t think starting a law firm in the midst of a global pandemic would present an advantage, but it has for Astraea Group. The team has known from the start that flexibility and anywhere access would be non-negotiable, so it’s no wonder the firm selected NetDocuments as their DMS. As a true cloud solution, NetDocuments offers the best in flexibility and efficiency without compromising on security or compliance. Nina explains:

“We are working in a sort of hybrid way where we’re partly in the office and partly from home — as many firms are post-COVID. **Having one system that allows us to see everything remotely has allowed us to effectively manage that model and be as efficient as possible.**”

Saving Email is Seamless

Email communications are essential to a complete matter file, but the process of saving those important emails can be a hassle — that is, unless you have NetDocuments. For Nina and the Astraea Group team, NetDocuments has taken the pain out of saving email to the DMS. With one-click predictive filing, capturing and organizing email is seamless.

“A powerful feature of NetDocuments is that it allows you to **fully capture all of the email traffic within the matter folders in a very easy way**. You can set up the folders so when you drag something from your inbox into a folder, it automatically syncs that folder to NetDocuments. Then you’re also not concerned that if someone leaves, they’re leaving with all the information on their email system that you can’t access. From that perspective, NetDocuments is great,” says Nina.

Elevated Compliance and Governance

There’s no doubt about it: Nina runs a tight ship. Fortunately, NetDocuments and Actionstep make it easier for her to keep things running smoothly while ensuring no information falls into the wrong hands. Nina shares:

“One thing that’s particularly important from a compliance perspective is that **NetDocuments allows us to regularly review what’s still outstanding and make sure compliance and governance concerns are dealt with as soon as they come**. I can log in and see where we are in the various matters and take any necessary action. It’s extremely beneficial for me running the firm.

Another useful feature of both Actionstep and NetDocuments is that you can **tailor what people see** and limit the visibility of things, which is good.”

Streamline Your Workflows

For many firms, having a documented process literally means having your process spelled out step-by-step in a document. It's not fancy or efficient, but it (mostly) gets the job done.

Astraea Group wanted to do better, so they created streamlined workflows using Actionstep and NetDocuments. Now, the system walks users through each step in the matter opening process and automatically populates templated documents. "You can simply click a button and it will populate things like engagement letters, client fund requests, and any other documents that you need in relation to those matters," Nina explains. Talk about a timesaver. She continues:

"Combining NetDocuments and Actionstep has allowed us to improve the workflow and the management of the workflow. **Everything is very connected and it all works really well together and saves a lot of time.** When opening a new matter, you don't have to separately go and save each document you've just created to your document management system. It all happens automatically. This has massively improved the efficiency of the matter opening process."

A Seamless Implementation with Experts

The key to maximising adoption is to have a seamless implementation that keeps momentum going internally. To deliver streamlined communications, NetDocuments partner Hoffbrand Consulting and Actionstep partner Cloudify Legal worked closely together to create a single point of client contact throughout the project. Paul Hoffbrand, Director at Hoffbrand Consulting, said: "This partnership created an essential 'one stop shop' for clients, which is vital for firms with little or no internal IT expertise. It was a pleasure to work with the team at Cloudify Legal."

Regarding the implementation, Nina says:

"It's been a hugely successful implementation for us and one that we are really reaping the rewards of now."

netdocuments®

Why Wait? Start Maximising Efficiency, Security, and Collaboration at Your Firm

Keeping your documents organized, compliant, and secure doesn't have to be a headache when you build a strong foundation that can properly scale with your business. Through the right technologies and partnerships in place, you can elevate compliance, governance, and productivity.



If your firm is ready to join Astraea Group in maximising efficiency and security, **request a consultation** with a legal technology expert today or call NetDocuments at **+44 20 3129 9324**.