



TRUE CLOUD DOCUMENT MANAGEMENT FOR BUSINESS TRANSFORMATION AT SHULMANS



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~ Mel Bulmer, Head of Operational Excellence

SHULMANS STATS

LOCATION

Leeds, UK
www.shulmans.co.uk

INDUSTRY

Legal

- NetDocuments customer since 2013
- 150 NetDocuments users
- 80 Lawyers

PRODUCTS



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A progressive management ethos and a belief in technology as a business enabler from their managing partner put Shulmans on the path to success from the get go; transforming working methods and improving client service were big drivers for their move to a true cloud document management system.

Technology as a business enabler

“The senior management at Shulmans are focussed on providing excellent client service and on Shulmans being a great place to work - they're attracted to using technology as a key enabler,” Head of Excellence, Mel Bulmer, says, adding that the managing partner is, “very forward-thinking. He's interested in cloud, automation and artificial intelligence. He is either a step ahead or alongside in terms of digital transformation.”

Bulmer's colleague, Kate Laycock, the IT Business Analyst at Shulmans who kicked off the DMS initiative some years ago, explains, “NetDocuments was really a standing start for us. Back then we were basically paper-based with very limited network-filed matters.” An imminent office move had the leadership team thinking about space and rationalising storage. “Our off-site storage had snowballed. A DMS was an opportunity to go almost paperless, improve working efficiencies and encourage flexible working patterns.”

Cloud, compliance and platform collaboration

Initial exploration of the market included a review of competitor iManage, explains Laycock. “On paper iManage looked like a good partner for our Microsoft Windows environment, but it didn't have the features we needed; it felt heavy, and at the time it had no true cloud offering.” Given Shulmans had already done a big piece of work around Cloud for Microsoft Office 365 they were keen for document management to be cloud-based, “We didn't have any nervousness or concern over cloud. We already understood the benefits.”

“NetDocuments is a significant improvement, our lawyers can work more efficiently and collaboratively now and we’re working smarter. We have instant access, files are in the right place and our response to clients is better as a result.”

~ Kate Laycock, IT Business Analyst

Given the increasing data protection and security challenges within the sector, it's unsurprising that security and compliance features were also significant decision factors. Shulmans found the NetDocuments solution compelling. *“The security model for NetDocuments struck me immediately, realising how secure it was and, for example, that big banks were happy using it. I was impressed,”* says Laycock.

The NetDocuments approach to platform development, adapting and improving based on specific customer needs, struck a chord with Laycock. *“Just one little example: the profile date feature is a type of trigger to replicate Saved Search. It means we can look at file information in a certain order. NetDocuments added it especially for us and it really helps with our transition - so our needs really are part of the platform’s iteration and evolution,”* she explains.

Once selected, NetDocuments carried out the implementation directly, taking a phased approach by business unit. *“The NetDocuments team helped us so much with the implementation, solving problems and exploring modifications.”* From pilot, the whole firm was live within three months with NetDocuments becoming the default for all new files and existing matters transitioning over depending on the amount of remaining work.



Rising to the change management challenge

The move to NetDocuments represented a big change for the firm and Laycock and Bulmer are both candid in admitting that, despite senior sponsorship, there was still initially some resistance to actual change, *“Our lawyers are very busy, it was a difficult sell in some areas because we had to build confidence. Mel came on board and part of her role was to focus on making it work.”*

Bulmer’s appointment added a more robust mandate to get everyone on board. *“My remit at the time, was to look at better ways of working, to improve systems and processes. One of the first things I saw was that NetDocuments was in place, yet with varying degrees of adoption. I soon realised the issue was not with NetDocuments but with our engagement as a firm.”* Mel and colleagues then worked hard to change this, explaining, *“we wanted to understand what the lawyers left behind were feeling.”* They found it tended to be those lawyers with long-running, document-heavy matters, that hadn’t embraced NetDocuments due to the timescales and the volume of documents involved. *“We realised they just found it very hard to find the time to transition and then perceived it would be easier to stick with the old ways for new matters rather than take time out to begin a new way of working.”* A focus on making it work for them was needed, so Bulmer and Laycock, working with the L&D advisor, created an education package, which included putting on training workshops and clinic sessions and showcasing the benefits. *“Training was the key, after that adoption came easily.”*

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“The senior management understand the value, it's a no brainer for them, because there are obvious experienced benefits, it goes from strength to strength. If we took it away now there would be uproar.”

~ Kate Laycock, IT Business Analyst

Reaping the benefits

There's now 100% adoption across 150 Shulmans users, including 80 lawyers. The majority use NetDocuments each and every day and work on it exclusively. Laycock says with NetDocuments, *“our lawyers can work more efficiently and collaboratively and we're working smarter. We have instant access, files are in the right place and our response to clients is better as a result. NetDocuments is a very significant improvement.”*

At the end of 2018 a request for disclosure in a litigation file came in. *“Normally this would require significant photocopying, boxes travelling in vans etc. This year we just shared a secure access link in NetDocuments,”* explains Bulmer. Once onerous compliance tasks are now a breeze. External auditors visit Shulmans each quarter to examine numerous files, *“We've gone from preparing 10 boxes of paper, to just half a box, the rest is digital. To me that's huge indication of trust in NetDocuments. Teams aren't using paper or keeping a paper backup,”* she adds.

Streamlined processes

Anti-money laundering is a centralised process at Shulmans, for each new matter a form is sent to Mel's team, they run the identification searches which are then stored in a central NetDocuments cabinet, *“For each client entity there's a container where the evidence is placed. In the matter we then have a NetDocuments Saved Search tool so the lawyer can easily make the final checks. We can also automate when checks need to be refreshed or mark for deletion – so we're complying with regulations with far less effort.”*

Today, some key clients also have access to certain files, and the team are running a pilot to create a holding library for long term deals so that documents that build over time can be easily found and shared by everyone involved in the deal. Plus, says Bulmer, *“the integration, being able to edit online with people is impressive. We want to encourage even more flexible work patterns. Access to a case file wherever you are is part of that and our people see that value.”*

“The senior management understand the value, it's a no brainer for them, because there are obvious benefits. NetDocuments goes from strength to strength. If we took it away now there would be uproar,” concludes Laycock.

THE BENEFITS...

- New efficient processes and workflows impact the firm's bottom line.
- Easier compliance and governance.
- Facilitation of remote working.
- Significant reduced email traffic, through send a link functionality.
- Reduced paper usage, printing and storage.
- Removed risk associated with missing physical documents.

The future

There's a lot on the 'to do' list: First up is ndMail, Bulmer explains, *“We've known for a while ndMail is what we need and what we want - we expect it to have a massive impact - we're very excited about predictive email filing and intelligent automation!”*

Number two on the list is a pilot of ndThread. The firm has identified two or three teams that need to collaborate more than others. *“It makes sense to start with the client-facing transactional and litigation teams,”* Bulmer explains, and beyond lawyers it will benefit functional teams too. *“The IT team work with a number of external contractors so ndThread will enhance that way of working, sharing highly sensitive information and creating a communication record.”* She says they are also keen to use it within her team, *“we're responsible for significant drafting of policies and procedures, there's lots of to and fro email, plus we do work remotely at times. Discussions within ndThread will be great.”*

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A FEW OF OUR FAVOURITE THINGS...

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~ Kate Laycock, IT Business Analyst

 **Reduced email traffic via 'send a link' functionality.**

 **Manipulate attachments from within emails.**

 **Saved Search tool creates efficient processes and a record of activity.**

 **Robust security and compliance features.**

About Shulmans

Based in Leeds with an office facility in the City of London, Shulmans is an innovative and award-winning corporate law firm, delivering first-class legal services to clients regionally, nationally and internationally. Services are characterised by a bespoke needs and results centred approach. Depth of expertise and flexibility provides clients with a reliable and cost-effective service. The firm employs talented people who can analyse the minutia whilst always keeping in mind the big picture context. Shulmans is also a member of Interlegal to provide ready access to high-quality legal advice from firms with local knowledge across 40 countries.



About NetDocuments

NetDocuments is a cloud-based, legal technology services pioneer. NetDocuments has spent two decades providing customers with safe, ready and proven solutions that improve security, increase productivity and help firms to provide a better service to their clients. The NetDocuments platform leads the industry with state-of-the-art machine learning and artificial intelligence capabilities. NetDocuments enables 2,500+ global customers today with a single, scalable cloud-based platform for creating, accessing, securing, managing and collaborating on documents, emails and real-time conversations.

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