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STEWART McKELVEY
LAWYERS • AVOCATS

" All in all, our NetDocuments Go Live was a great success and a smooth transition! The NetDocuments implementation team did a fantastic job. "

~ Sherri Thom, Stewart McKelvey

STEWART MCKELVEY STATS

LOCATION
- Six locations in Atlantic Canada

INDUSTRY - Legal
- Full service law firm
- Largest law firm in Atlantic Canada with over 220 lawyers and 300+ staff
- Over 30 years as a regional firm, with roots dating back to confederation
- NetDocuments customer since 2017
- 570 NetDocuments users

PRODUCTS

netdocuments®

📖 **nd**Mail™

⊕ **nd**Office™

📍 **nd**FlexStore™

One Platform. Unlimited Possibilities.

🛡️ Safe   🔄 Ready   👥 Proven

LEADING CANADIAN LAW FIRM STEWART MCKELVEY TAKES 'JUST A DMS' MANTRA TO NEW HEIGHTS

Lydia Bugden
CEO & Managing Partner
Source: StewartMcKelvey.com

Stewart McKelvey is no stranger to innovation and leveraging technology to accelerate change. Considered one of the more enterprising firms in Canada, Atlantic Canada's first and largest regional law firm has a long track record for putting client service first.

In fact, the firm has taken on an IT leadership role with Paul Saunders, its first Practice Innovation Partner, by leveraging cutting edge technologies, creative problem solving and process improvement to maximize client value while minimizing costs and waste.

The NetDocuments project was part of an ongoing effort to provide greater efficiencies for working and collaborating.

Challenge: Maximizing Client Value

The 'maximizing client value' mission was front and center when Stewart McKelvey set out in 2017 to replace its document management system (DMS). According to Sherri Thom, firm IT Director for the last six years and lead on all firm IT and tech training projects, the firm faced unsurmountable challenges with its existing OpenText eDocs system.

"Essentially, our DMS had become obsolete ... it was lacking matter centricity, greatly restricting our ability to better collaborate; our existing email and broader application integration was challenging; the system lacked mobility; and from a security perspective, there were concerning challenges," said Thom.

Another firm business driver was delivering on its "Paperlite" initiative, something that was improbable at best with the existing system.

"We envisioned that a modern DMS could help with our Paperlite movement focused on collaborative matter centricity, mobile access, integrated scanning, OCR capabilities, and a more robust, better integrated enterprise search application using a more refined list of document types," said Thom.

- Converted and trained 565 users on NetDocuments including 225 Lawyers trained across 6 locations in 9 months.
- Coaches provided new standard in deskside, hands-on technology training support. Now being modeled firm-wide.
- Firm worked with KM group and NetDocuments to assemble focus groups including reducing document types in existing DMS from 1300 to 50.
- User adoption exceeding 97+%. Still working with small sub-sets of 'resistant to change' users.

Solution: Selecting Future-Proof Solutions

While NetDocuments addressed all the challenges identified by Thom and her team, there was an even more pressing 'show stopper' that previously kept Stewart McKelvey as well as many other firms throughout Canada from adopting native cloud technology.

"The firm considered NetDocuments for its flexibility in addressing country-wide information governance (IG) concerns and the ability via ndFlexStore to provide 'geo-aware storage flexibility, storing documents in distinct locations based upon different requirements in different regions," said Thom.

Thom also notes that ndFlexStore was what helped them make the business case for the cloud among internal skeptics and clients.

"ndFlexStore satisfies our governance, data residency and disaster recovery requirements," said Thom. "In addition, we are using customer managed encryption keys using NetDocuments HSM which provides an additional layer of security for our documents."

Implementation: Executing the Perfect Go-Live

Technology is only as useful as users' willingness to use new technology and overall adoption. This could not be truer than with a firm DMS, which is one of the few technologies that all firm users rely on and leverage daily. Thom and her seasoned project team shared best practices which proved integral in pulling off a smooth go-live:

Buy-in: Any change management initiative sinks or swims with firm-wide buy-in and communication. From the outset, firm IT supported by its practice innovation leaders, involved lawyers, support staff, operations and partners in the DMS switch-over. Sherri and her team included feedback from well over 100 lawyers and staff across the firm, conducted perception surveys to develop a NetDocuments DMS proof of concept and had more than 60 lawyers and staff test the system.

"We wanted to provide as much input without slowing down the project. We visited every office, providing a preview of NetDocuments, sharing roll-out timelines and sharing pilot group feedback," stated Thom "We offered focus groups from all Practice Areas to demo NetDocuments and help make important decisions related to the design and document types we would use in NetDocuments."

Technology and Services Dream Team: The firm worked hand-in-hand with the NetDocuments DMS implementation team and engaged with Traveling Coaches to help with change management processes, getting users involved in the process, as well as product training and post rollout floor support.

Communications: The firm set out to create awareness and desire internally by communicating at every turn including educating users on NetDocuments' terminology, features and functions. Thom's team created short educational videos to share and setup sandbox sessions to help visualize design options and help everyone become more comfortable with the upcoming change. The firm leveraged its SmartNet KM portal to maximize overall exposure and familiarity prior to go-live.

"All in all, our NetDocuments Go Live was a great success and a smooth transition! The NetDocuments implementation team did a fantastic job. We also used Traveling Coaches for training, floor support, and change management and they were equally integral to our success. And finally, my own team did an amazing job planning and preparing for the rollout and ensuring a seamless transition for our people," said Thom.

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