



THE DEFINITIVE GUIDE TO DOCUMENT MANAGEMENT

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INTRODUCTION TO DMS

As a steward of government information, you're keenly aware of cybersecurity threats and their potential for destruction. Ransomware is increasingly sophisticated and agencies are under more public scrutiny than ever. This is why it will come as no surprise that the biggest threat government entities face today is the possibility of a security breach.

According to the FBI's 2019 Internet Crime Report, over 2.3 billion complaints were filed for stolen or compromised data in the past year. In fact, since 2015, the FBI has recorded over \$10.2 billion in losses from cyber attacks.¹

It's clear that if your organization is fortunate enough to not have been the target of cyber crime, it is only a matter of time. This is especially true as individuals seek more flexible ways of accessing work to accommodate increasing demands of the workplace.

The Growing Demand for Digital Documentation



Since 2009 the amount of individuals with access to the internet has doubled worldwide.² Just as this increased connectivity has changed how we function in our day-to-day personal lives, it has also changed the way we communicate professionally.

Specifically, employees as a whole have lost patience with slow, laborious communication. Stakeholders now demand the convenience and pace of digital correspondence, requiring more insight into the services provided by departments and teams.



“Cyber criminals have begun to target lawyers to access client information, including trade secrets, business plans, and personal data. **Lawyers can no longer assume that their document systems are of no interest to cyber-cooks.**”

New York Ethics Opinion 1019



Since many agencies are unable to provide sufficient remote access and document sharing capabilities as a result of stringent technology compliance requirements, individuals in recent years have been forced to find creative ways to serve and communicate with colleagues and peers — which, unfortunately, often results in documents being removed from the safety of the agency's network.

Luckily, there are document management systems (DMS) that provide the robust safety measures that lawyers require to defend against cyber-attacks while providing features they need to work effectively across the organization.

In this paper, you'll learn what a DMS is, its importance, how to select the right solution for your legal team, and how to measure its success.

WHAT IS A DMS?

In the past, a DMS usually involves retrofitting existing technology within an agency's tech stack to provide a somewhat secure, often clunky, file structure.

Today, departments and teams are turning to a modern cloud-based DMS to provide newer, faster and frequently changing technology to solve current business problems and future proof the organization. Cloud DMS technology provides flexible structure, ease of use, and security required to protect sensitive information while maintaining flexibility and enabling remote work.



According to the [Association for Intelligent Information Management](#), a DMS “incorporates document and content capture, workflow, document repositories, output systems, and information retrieval systems,” in addition to storing, controlling, and tracking documents.³ As government agencies seek to protect their information without impeding their team's ability to complete work, it's clear why a strong DMS is the backbone of any high-performing department or team.

A forward-looking DMS solution goes above and beyond this standard definition, expanding to provide greater collaboration and work productivity.

The Benefits of a DMS

While a seemingly straightforward piece of software, it's important to note that a DMS offers substantial benefits. Depending on the service, organizations can look forward to cost savings, increased productivity, and streamlined operations.

- **MANAGE INTERNAL COSTS**

By digitally organizing a department's files in a single, central location, a DMS not only reduces the risk of losing information but also decreases the labor required to file and store important information.

A cloud-based DMS offers additional operational cost savings as it removes hardware needs and reduces the strain on IT resources. A cloud-based DMS also enables more flexibility in where and how people work (e.g. remote and mobile work).

Depending on the service, organizations can look forward to **cost savings, increased productivity, and streamlined operations.**

- **INCREASE PRODUCTIVITY**

A DMS makes it much easier for individuals and teams to locate and govern documents through sophisticated search, tagging, and profiling. These features dramatically decrease the time individuals spend locating documents.

Robust DMS typically offer secure internal and external collaboration tools that make it easier to work on content within an organization and across stakeholders.

- **STREAMLINE SECURITY AND COMPLIANCE OPERATIONS**

As documents are organized in a single, secure location it becomes significantly easier for IT and compliance teams to protect content and mitigate internal and external risks.

Storage and organization processes may also be standardized throughout the organization, helping departments and teams keep files organized, including enforcement of retention policies or protecting other important and sensitive content.

4 Unique Benefits of a Cloud-Based DMS

While on-premises solutions have some good qualities, cloud-based solutions are becoming the increasingly preferred route as it provides greater flexibility with improved security while reducing the burden on IT resources performing administrative tasks such as backups and database maintenance. In fact, the 2019 [International Legal Technology Association](#) (ILTA) survey predicts that in the next 3-5 years, cloud technology will be a driving factor in the legal profession. Below are the top four reasons why:

- 1. A cloud-based DMS improves your security and compliance.** Hardware and internal networks are both costly and complex to maintain and update, and they are often not flexible enough to quickly protect against the latest threats. Cloud-based DMS can quickly pivot security measures to protect against these evolving threats without disrupting work.
- 2. A cloud-based DMS reduces hardware and maintenance costs.** Without expensive equipment to maintain or experts to pay, cloud-based systems are essential to a modern IT team looking for ways to effectively transition to predictable budgeting as they face increasing pressure to demonstrate good stewardship over public funds.
- 3. A cloud-based DMS makes flexible work a reality.** With a cloud-based DMS, you open the possibility of working remotely without compromising security. No longer do you have to return to the office for documents or worry about losing a key file. Many cloud-based systems offer built-in mobility which usually means there are native applications on iOS/Android to enable you and your team to work anytime, anywhere, and on any device.
- 4. A cloud-based DMS increases collaboration.** A cloud-based DMS increases collaboration by nature. You can interact with documents in real-time as a team, with the ability to leave and return as needed.

To learn more about why firms everywhere are adopting cloud-based DMS, [download this guide](#).



3 KEY IMPACTS OF A DMS ON YOUR TEAM

As the backbone of any high-performing team, a DMS has far-reaching impacts across the organization including risk management, information governance, and workflows. Below are the three key impacts.

- 1. Improved client relationships.** Your department or team's work product is likely buried in personal files which pose major risks to sensitive information in cases of cyber-attacks, disorganization, or unresponsive employees. A DMS creates a central access point for projects with standardized organization, reducing the risk of content being stolen, lost, or inaccessible.
- 2. Enhanced information governance.** One of the most crucial functions a DMS will support is that of information governance. In fact, a recent report found that due to the costs of storage, control, and compliance, poor data management can cost organizations [\\$2.1 million each year](#) on average.⁴



As individuals work to involve stakeholders and increase communication, it's important to ensure that sensitive information remains safely stored and organized in secure locations to avoid exposing an organization to incredible financial risk and public embarrassment. Consider the fees the following [major organizations were forced to pay](#) after data breaches uncovered poor data management:⁵

- British Airways: \$230 million
- Marriott: \$124 million
- Equifax: \$575 million

While it's true most government entities do not run the risk of lost revenue in the case of a data breach, they are still subject to fines and settlements with victims. This is why, as stewards of extensive private information, you have a duty to pay particular attention to how technology can further extend your ability to protect the public's information.

Robust DMS will provide solutions for tracking, managing, and controlling both access and actions on information stored within the system, in addition to standardizing the organization and profiling of documents. These features combine to make it easier to manage information across departments and teams and comply with current information governance standards.

3. Improved workflows. As the backbone of your organization, your DMS determines how efficiently your department or team can work independently or cross-functionally. This efficiency is often determined by the features available within a DMS. To have the maximum impact on efficiency, look for a DMS that provides:

- Anytime, anywhere access and mobility
- Ability to create, edit, save, and version documents
- Ability to organize documents to support legal and other internal workflows
- Easy ways to locate/search for documents
- Custom meta-data that powers search and organization
- Integration with productivity tools and applications
- Project and document access: create security groups and apply access rights



These features will support individuals as they strive to deliver quality services faster and more efficiently by helping them locate, re-use, and organize content quickly

DMS SELECTION BEST PRACTICES

The best DMS will take basic document organization a step further, incorporating additional features such as email management, real-time messaging and chat solutions, document compilation and PDF conversation tools, AI and machine learning for process automation, advanced search options, and robust security and compliance measures. Each additional feature will likely benefit certain roles throughout the company, which is why it's important to involve key stakeholders early on and communicate to departments often.

The implementation of new system will have far-reaching impacts on every department, which is why it's essential that key players across departments and functions be involved in the selection process.

Let's take a look at this six-step process for a smooth DMS selection and implementation:

- 1. Appoint a project leader.** In government agencies, it's common practice for Senior Counsel, Chief Information Officers, and Directors to spearhead the implementation of a new DMS — researching features, capabilities, and providing a clear point of contact to check in with regarding progress.
- 2. Involve key stakeholders.** The implementation of new system will have impacts across multiple departments, such as IT and compliance, which is why it's essential that key players across business units be involved in the selection process. Consider including representatives from impacted departments along with the legal team during the process.
- 3. Determine scope.** Working with the key stakeholders, the project leader should determine which gaps and processes a new DMS could facilitate, automate, and improve across the organization. Knowing this information will inform which key features to assess during the research and evaluation phases.
- 4. Select a DMS solution.** Once initial prospecting is complete, it's crucial to dig into product demos and ask detailed questions of how DMS solutions can help you save money, increase productivity, and protect data. Often, scorecards are created—outlining their most important concerns—for use during demos. Ensure that your DMS complies with all requirements, including security and compliance regulations (e.g. FedRAMP Authorization for cloud providers).
- 5. System implementation.** Depending on the size of your organization and the service selected, implementing a DMS can take about six months with key phases including data mapping, in-depth training, system builds, and data migration.
- 6. Hold the team accountable.** Change can be difficult, especially if your teams have a long-standing, traditional process that has been unchanged for years. Even after initial training and implementation, get ahead of lingering resistance by offering additional training sessions, scheduling frequent check-ins, and monitoring status reports to ensure the team is maximizing the full suite of capabilities in the DMS.



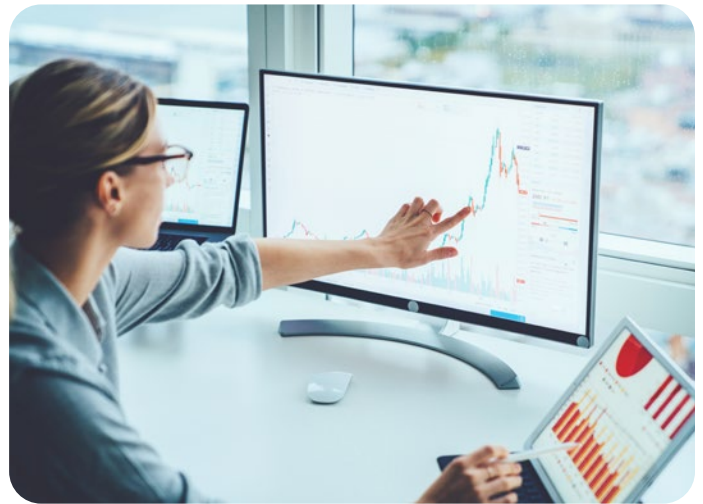
MEASURING IMPLEMENTATION SUCCESS

Implementing a new DMS is about more than simply providing a new system. Instead, success means individuals and teams are utilizing the system to not only complete work faster, but to also strengthen their relationships with stakeholders across the organization.

To ensure adoption and identify roadblocks of your new DMS, you may want to monitor a set of key performance indicators (KPIs).

Monitoring the following metrics can help you catch problem areas early and continue to train late adopters.

- Number of active users. This data will help you determine if there are late adopters or those refusing to utilize the new system in order to provide further training and help.
- Increases in project completion. This will help you determine if the organization is still spending time on administrative tasks or can spend time on what truly matters.
- Employee satisfaction. It's safe to say that if your DMS is helping individuals be more efficient, they will be able to manage their workload better, improving workplace satisfaction and avoiding burnout.
- Compliance and security updates. Monitor to see if it's easier for your team to stay up-to-date with compliance and security requirements since implementing your DMS.



Apart from the data collected above, you can also collect opinion surveys from those who use the DMS by asking them:

- What do they think about your document management process?
- Are they happy with the collaboration features?
- Is it easy for them to use?
- In what ways would they change the system?



TAKE ACTION TODAY

The threat of a cyberattack is very real and has enormous consequences. But this does not have to cripple the organization or team with fear.

By implementing a proper DMS that's created specifically to fit the needs specifically of lawyers, you can maximize collaboration, security, productivity, and efficiency for your entire department.

ABOUT NETDOCUMENTS

NetDocuments is the only FedRAMP Authorized, cloud-based document and email management solution to securely store and organize documents on one platform. With NetDocuments, users can work securely on documents and file emails anywhere in the world on any device while collaborating with internal and external stakeholders alike—which makes it an ideal solution for remote work.

Backed by 20 years of experience in cloud innovation, over 2,750 companies worldwide trust us 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 today.

To learn more about maximizing productivity, mitigating risk, and building collaboration: Contact us at **(866) 638-3627** or visit **www.NetDocuments.com** to learn more today.

SOURCES

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