26 QUESTIONS TO ASK
WHEN CONSIDERING A CLOUD DOCUMENT MANAGEMENT PLATFORM

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Document management systems (DMS) are central to how modern lawyers manage and complete their work. As matters become increasingly complex, it is critical for staff to have the tools that remove burdensome gaps in their workflows while enabling efficiency gains.

Document and email management *platforms*, specifically *cloud platforms,* are quickly becoming the favorite of legal professionals around the world, thanks to anywhere access, seamless backups and updates, and innovative security features.

But the legal market is becoming flooded with various options and vendors, making it difficult to find the *best fit* for your team, the first time around. Luckily, you're here! Reading this guide is an excellent first step in your DMS selection journey. From user experience to system analytics, we'll give you the absolute must-ask questions to ensure you find the perfect DMS for your organization.

USER & ADMINISTRATOR EXPERIENCE

Beyond evaluating the user experience and dependability of the platform, it's critical to consider the effort required to maintain the DMS on the back end. This behind-the-scenes work can have significant impacts on the future cost, performance, efficiency, and security of your DMS. Be sure you ask every potential provider:

1. Will your DMS integrate with my firm's current technologies?
Technology is becoming more prevalent in legal work, but if your organization's technology doesn't operate in sync it can lead to gaps in productivity and content security. Search for a DMS that supports a large partner ecosystem, has fully integrated products, and offers an open API that can be utilized for customized integrations as needed.

2. What can my IT department or vendor expect in terms of time commitment to support this solution?
While cloud solutions do require some time commitment to implement up front in order to customize the system for your organization, there are far less demands in terms of future maintenance. Modern cloud DMS solutions boast rapid deployments, automated updates, and instant access

to new features—adding up to increased organizational agility, enhanced productivity, and tighter security without IT having to do more than notify their end-users.

3. How intuitive is it to use your system? What is the user experience like?

User adoption is among the top concerns for any DMS deployment, and for good reason. Without high user adoption, any new piece of technology will be all but useless. It is vital that any DMS under consideration deliver a user experience similar to everyday consumer tools to help minimize the learning curve.

4. Can we please get a list of 5 customers using the same instance we are considering and hear from them?

While many applications seem to offer the same functionality and speeds on the front-end, it's important to assess the back end architecture of any potential system to protect your organization from any unexpected hardware requirements and costs. As some vendors make the move towards the cloud only some of their offerings may be available as cloud-based, while others still require on-premises support. Ask your potential vendor for at least five customers using the same instance and version that you are considering, read reviews, and get access to customer forums in order to gain a clear understanding of what users are *actually* saying.

5. Can I access each of my documents on a mobile device? If I lose internet access will I still be able to save, search, and access files?

Anywhere access is a key tenant of cloud software generally, and it's no different when it comes to a cloud DMS. Modern and mature solutions should offer iOS and Android applications that deliver the same functionality across devices, but with experiences optimized for your current device—ensuring an intuitive experience. Robust solutions should also offer offline work, with automatic syncs, in order to maintain the seamless experience your users expect.

> *"I realized quickly that NetDocuments was a huge leap forward in terms of the ease with which I could share documents with other lawyers and clients. Keeping versions straight was simple and straightforward without the need to manage any servers or file shares."*
>
> Jay Selanders - Chair of Kutak Rock

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ORGANIZATION & WORKFLOW

Key to any successful DMS solution is how effectively it removes the burdens of onerous, repetitive tasks that drain your employee's time. Ask providers:

6. Can your DMS *actually* help my organization keep content organized and teams productive?

Legal and other professionals have strict ethical guidelines that must be followed as they handle client content and information. A DMS vendor should have a clear, in-depth understanding of your professional requirements and offer solutions that feel natural. The best solutions will be flexible enough to enable a variety of work preferences, rather than forcing you into a single path to success.

Look for features such as workspaces that keep every communication and document organized, suggested email filing locations, advanced search options, optical character recognition, advanced version histories and controls, dynamic document profiles and metadata, and integrated filing from your organization's favorite word processor. Although features like these may seem insignificant, they add up to make big impacts on your team's time.

7. What differentiates your DMS from enterprise solutions in supporting my specific needs?

While broader enterprise solutions are wonderful options for the everyday professional, they are simply not built to support the necessary workflow, collaboration, and security requirements regulated industries need out of the box. A DMS built for legal professionals provides the necessary metadata and security inheritance, document and email integrations to streamline filings, and matter-based organization built upon how legal professionals work.

8. Does your solution offer integrated email management?

Email continues to be the preferred method of communication for organizations. Mature DMS solutions will provide integrated email management features, both on desktop and mobile devices, that offer a seamless experience for filing communications alongside documents and other files on the fly, making it easy to build a single source of truth.

9. How does your solution make searching for documents easier?

The ability to locate documents quickly is critical to keeping lawyers productive, which is why the search capabilities of a potential DMS should never be overlooked. Leading solutions integrate with common applications such as Microsoft Office®, SharePoint®, Adobe®, and Gmail®.

These advanced solutions often mimic consumer-grade programs everyone is used to in order to decrease the learning curve and can offer optical character recognition technology that automatically enables your lawyers and staff to search the full-text of any document—even if it's 'unreadable.'

SECURITY & COMPLIANCE

Cloud solutions often offer advanced security and compliance options that organizations would be hard-pressed to replicate without significant investments and manpower. You need to know:

10. How secure will our documents be inside your system?

Cyber threats are becoming increasingly sophisticated, and lawyers are a prime target for attacks. According to the 2020 ILTA Technology Survey, law firms who have experienced a known breach *increased* by 29% in 2020 alone. While a DMS does not guarantee you won't experience a breach, it can offer features that reduce your organization's risk.

Leading solutions will provide multi-layered security approaches that offer internal and external risk reduction features, including: automatic, layered encryption on all documents and emails; data loss prevention; need-to-know access; and behavior analytics. They should also support features that can help you meet legal requirements, including GDPR and CCPA, and have both a platform and service that comply with trusted cloud standards and certifications such as ISO 27001 series and SOC 2 Type 2.

"The product was easier to launch and to get up-to-speed on from our user community's perspective than we could have even hoped for."

Bret Chapman - Chief Administration Officer, Husch Blackwell

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11. How quickly is your platform able to deploy updates to address new threats?

Cyber threats evolve at a rapid pace, which means if your software is out of date your documents are at risk of a breach. A true-cloud DMS—meaning systems that are not hosted at the vendor's site—are best equipped to help you meet these challenges. Their architecture makes these systems well-positioned to swiftly build and deploy updates to protect against the latest threats without the need for a system outage. These small, regular updates also protect lawyer productivity as they need only learn a few changes rather than overhaul their processes.

12. How easily can I maintain access controls and prevent unwanted actions on documents?

No security feature can stand up against poor security maintenance. A modern DMS focused on security should provide an administrative view that makes maintaining security protocols simple and straightforward. These admin views should allow administrators to apply security protocols at various levels (e.g. the broader company down to a single document) in order to support proper security hygiene without burdening the IT professional managing the system.

INTERNATIONAL OFFICES:

13. Can your DMS support compliance standards within various geographies?

Just as cybersecurity is becoming more complex, so is compliance in various geographies. While firms must store files in compliance with local standards, they must also have the ability to work out of a single repository. Leading document management solutions will provide geo-aware storage options to help your team achieve organization, compliance, and productivity regardless of which office they are working out of.

COLLABORATION

As matters increase in complexity so does the need for improved collaboration between colleagues. It's critical that any modern DMS offer features that smooth sticky points in the collaborative process.

14. What features does your DMS offer to support collaborative workflows?

Solutions that support collaborative work will feature detailed version control, integrations with your favorite cloud word processor, shareable workspaces for users outside your organization, and options for receiving feedback that keep the content creator in complete control of their document.

15. Are we able to manage the creation of our documents within the DMS?

It's critical that tasks never fall through the cracks, but with many lawyers relying on Excel or Word to manage their day-to-day tasks there's a lot of room for error. Leading document management solutions provide task management tools that help lawyers keep their tasks organized as they create content spanning numerous matters. A modern DMS will also integrate seamlessly with contract lifecycle and practice management software so when content is complete, it can be easily accessed and managed in the appropriate tool.

16. Communication is speeding up. Are we able to chat within your system?

While email continues to be the preferred method of communication, instant chat tools are gaining popularity in the most innovative law firms. A modern DMS vendor will provide integrations with your favorite chat solutions or offer a built-in chat tool that allow lawyers to share and collaborate on documents while automatically filing conversations under the matter, helping you maintain document security.

> *"What made NetDocuments stand out from the competition is the overall user experience. We were impressed by the easy-to-use user interface and by how it mirrored the applications our staff use every day."*
>
> Julie Berry - IT Partner, Saffery Champness

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DOCUMENT DELIVERY:

Mail, fax, and other paper-centric delivery options are perceived as outdated delivery methods in today's fast-paced, digital world. A modern solution should provide multiple options for sharing documents in secure, digital formats.

17. What options are available for sharing documents externally? Are they secure?

Sharing content with external sources can be a risky action if your DMS is not prepared to secure your information. A DMS prepared to meet your external delivery and collaboration needs will provide flexible, encrypted delivery methods—such as email or an integrated extranet—with options to apply passwords and access expiration dates as needed.

18. Can I compile documents directly within your DMS?

Modern document management solutions will provide your teams tools to compile documents directly within the system. Some of these tools offer planning functionality to enable lawyers to plan out the document set and then simply drag-and-drop completed documents in. Lawyers may then order and re-order them over the course of the matter. These tools should also provide options for converting the set into a PDF and be delivered via the system's delivery options.

19. Can I maintain control of my documents when sharing with external users?

To cut down on the number of document versions lawyers have to manage, it's critical that a modern DMS provide feedback tools that do not require the lawyers to give a third-party access

to the core document. Innovative management solutions have developed previewing and other feedback tools where third-party users can view the content and add comments on top of the native document—without having full access to the base file.

PLATFORM MONITORING

You invest a lot of time into the selection of your DMS and require access to insights that will ensure you're getting the best ROI from your technology.

20. How can I ensure I'm getting the most out of my platform experience?
A malfunctioning DMS can cost your business tens of thousands in lost productivity over the course of a year. Truly reliable DMS platforms openly share their performance data, and are now providing tools to monitor your organization's system performance to ensure you're getting the most out of your investment.

21. Does your platform allow me to monitor user behavior?
Insights into user behavior is becoming increasingly important for businesses as they work to replicate their top performer's workflows and safeguard against data loss. A cutting-edge DMS will provide the tools necessary for monitoring behavior in simple, straightforward, and easily understood formats to help you improve training and productivity across the organization, while keeping a watchful eye on data movement.

22. What technical support do you offer when my system isn't performing up-to-par?
Regardless of how advanced your DMS is you will likely run into challenges at some point. It's important to select a vendor who understands that system downtime means lost revenue for you and provides access to experts who can get your system in working order as quickly as possible.

CHANGE MANAGEMENT

Every firm operates in unique ways, which means no single change management strategy can fit every team.

23. What's your strategy for transitioning/onboarding?

Seek out DMS providers who are able to provide a tailored change management experience, whether through their own services or expert partnerships, to ensure your lawyers get the time and attention they deserve to make your implementation a success.

BEFORE YOU SIGN

There are just a few other considerations you will want to account for during the selection process that are not directly connected to the core technology.

24. What does the software cost?

If the DMS under consideration is cloud-based you can likely expect a one-time onboarding fee and a per-user annual subscription fee. If the system you are considering is on-premises you can also expect yearly maintenance costs and scheduled system downtime to keep up with the latest updates. It's smart to ask a potential vendor for an itemized price list that reflects all of your costs to ensure there are no surprises or hidden fees.

25. How quickly can we begin a proof of concept? Will this be the same environment as all of your production customers?

A true-cloud service can have a proof of concept (POC) architected and live within 1-2 days, if not sooner. If the service provider requests a longer time frame to stand up your test environment, you are likely not receiving a true-cloud experience and will instead be working within a hosted cloud, meaning the service provider is simply connecting you to servers hosted on their own worksite opposed to yours.

> **"The work was impeccable. The entire NetDocuments team has made a great impression on us...at the end of a 6-month implementation process, we look back and could not be happier."**
>
> Ariel Mihovilovic - Partner, Claro & Cia

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26. Why should we select your DMS over your competitors?

The legal technology marketplace is increasingly crowded, and in terms of features, solutions will continue to leap-frog each other year after year. What should really be the determining factor is whether or not a vendor truly *understands* the needs of legal professionals. This means vendors must actively listen to their customers, stay informed on industry developments, understand how new regulations will affect workflows, and finally build tools and solutions that will help lawyers meet challenges before they even become a thought.

This is why it's important to get involved early on with the communities where vendor's customers are active. Uncover how responsive a vendor is, if they were honest in the sales process, and if they provide the support and innovation they promised up front. The technology is only one aspect of a vendor. The *people* who are building and running that technology are what will really determine your firm's success with the DMS you select.

PREPARE YOUR FIRM FOR EVERY CHALLENGE

2020 demonstrated that technology can be the determining factor for whether your organization succeeds or struggles in difficult circumstances. Firms who had adopted cloud document management solutions before the 2020 pandemic were able to transition to remote work with little effort, maintaining business continuity throughout the endless changes the year brought.

While cloud technology can seem daunting for many legal professionals, it's fast becoming the top choice for innovative legal teams who see it's potential. Offering cost savings, increased security, improved workflows, and increased business continuity, a cloud-based DMS is the smart and logical choice for firms preparing for the future of legal work.

ABOUT NETDOCUMENTS

Storing, managing, and protecting millions of documents that are created and shared by thousands of people is never easy. All too often, they become a chaotic, obtrusive, and risky burden on your organization.

NetDocuments changes the equation, with a content platform that removes the barriers and transforms all your documents into an unstoppable engine for collaboration, productivity, growth, and inspired work—without limitations or restrictions.

With NetDocuments, millions of scattered documents become one source of unified insights. Your content management processes and workflows make the leap from intuitive to invisible. The full power of your collective knowledge and past work becomes available wherever your people need it. And every document gets the industry's best protection against any type of threat—from careless employees to nation state attacks.

So when you imagine a future where your content is always safe, organized, compliant, and available to inspire your best work, NetDocuments is ready to take you there.

NetDocuments is the leading cloud-based document and email management solution that helps law firms and teams securely and easily store, collaborate, and organize documents in one location. Backed by 20 years of experience with over 3,050 customer firms worldwide, there's a reason why NetDocuments is the #1 choice for law firms and legal teams across the globe.

When technology is smart enough to stay out of your way, *That's Work Inspired.*
Learn more at **www.NetDocuments.com** or call us at **(866) 638-3627.**