



CONSIDERING A CLOUD DMS?

Ask These Critical Questions First

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THERE IS NO “STANDARD” CLOUD

As everyday consumers we often assume “the cloud is the cloud,” but the stark reality is **cloud services can have incredible variations in architecture**. And, when utilized in the context of a law firm, these variations can either protect client data or place it—and the business—at risk.

In this short guide, we draw on our **20 years of cloud document management experience** to share with you the top must-ask questions to ensure the cloud document management service (DMS) your firm selects will be safe, effective, and reliable.

QUESTION 1

Will you please share with me 5 customers that are using the same version of the cloud that I'm looking to buy?

Some cloud service providers may attempt to mislead consumers, promising a "holy grail" with no tangible timeline. This is why it is critical you receive *at least* 5 references of customers actively using a provider's cloud solution to properly scope the functionality service.

Suggested follow-up questions:

1. What **percentage** of your user base do your cloud customers represent?
2. **How long** has the average cloud customer been live?
3. What **version** are you (the vendor) demoing?

QUESTION 2

How many of your customers have left to your main competitor?

The goal of this question is to learn whether consumers are typically satisfied with the service they are receiving. It may seem obvious, but if customers are consistently switching to other solutions there are likely challenges with the service yet to be identified.

Suggested follow-up questions:

1. **Why** are customers leaving to your competitor?
2. Reach out to the competitor and **ask why** recent customers have moved.

QUESTION 3

How quickly can we begin a proof of concept?

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*.

Suggested follow-up questions:

1. Is this **proof of concept** in a multi-tenant or hosted cloud environment?
2. **What must be done** in order to take a proof of concept live?
3. Will this be the **same environment** as all production customers?

QUESTION 4

Can we review your cloud services agreement?

Your DMS is core to how work gets done at your firm, and even minutes of downtime can cost tens of thousands in billable hours. This is why it's important to take a close look at a provider's system availability and how many hours of maintenance recovery they reserve.

Suggested follow-up questions:

1. Can you send me a **public link** to where I can view your service's live up-time?
2. What has your **average up-time** been for the last year?
3. Do you **calculate service availability** on a platform or account level?

QUESTION 5

How large is your partner ecosystem?

A DMS may be the backbone of your firm, but it requires a suite of technology to propel the business forward. True cloud services often offer open APIs for other technology providers, or firms themselves, to build off of. This allows firms to quickly integrate current systems and use the DMS as a center of gravity in their technology stack.

Suggested follow-up questions:

1. **How easy** is it to build off of your API?
2. What is **your policy** on competitive partner integrations? E.g. If I invest in a product and you decide to enter that partner's space, will you continue to **support their product**?



THE RISKS OF A HOSTED CLOUD SOLUTION

Hosted cloud environments are often utilized as on-premises providers transition services to the cloud.

While the differences in usability may seem negligible, a hosted cloud does not provide the same security or technical capabilities as a true, multi-tenant solution.

With a hosted option, updates must be done individually for each hosted client, they cannot be pushed out all at once, like you can with a cloud provider. Not only does this mean a hosted solution exposes you to greater risk in terms of cost, time, and security, but because individual customers can be on different versions of the hosted software, the vendor has more versions to support.

Overall, when you sign up for a hosted cloud solution you're setting the organization up for **a second migration of content, series of system outages, possible violations of client agreements, and more.**

Top risks of a hosted cloud:

1. Secondary **content migration and disruptions** to work
2. Increased chance of **system outages** on an untested, unreliable multi-tenant cloud
3. **Violation** of data processing agreements with customers

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