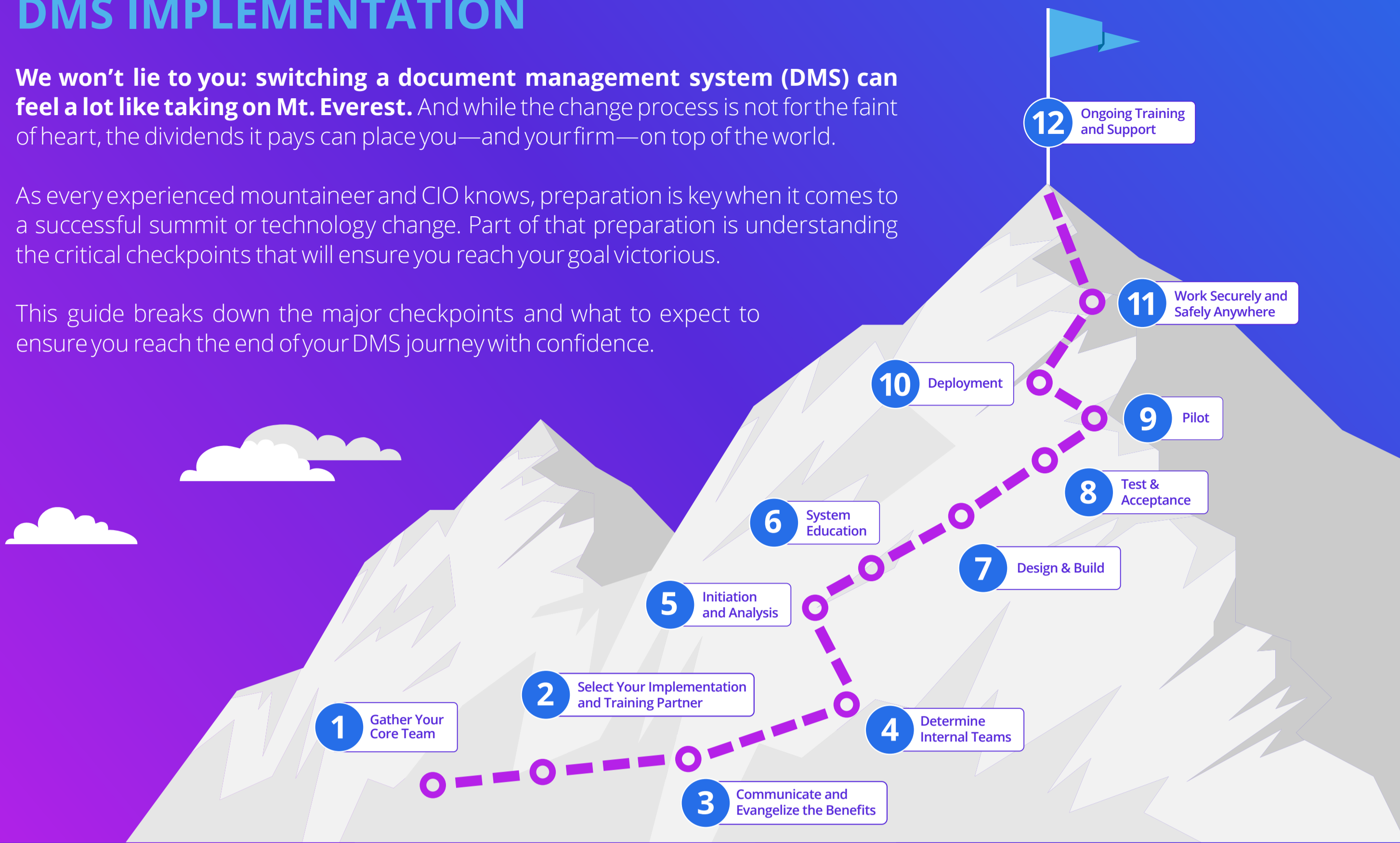# netdocuments

12 CHECKPOINTS FOR A SUCCESSFUL DMS IMPLEMENTATION

We won't lie to you: switching a document management system (DMS) can feel a lot like taking on Mt. Everest. And while the change process is not for the faint of heart, the dividends it pays can place you—and your firm—on top of the world.

As every experienced mountaineer and CIO knows, preparation is key when it comes to a successful summit or technology change. Part of that preparation is understanding the critical checkpoints that will ensure you reach your goal victorious.

This guide breaks down the major checkpoints and what to expect to ensure you reach the end of your DMS journey with confidence.

- **12** Ongoing Training and Support
- **11** Work Securely and Safely Anywhere
- **10** Deployment
- **9** Pilot
- **8** Test & Acceptance
- **7** Design & Build
- **6** System Education
- **5** Initiation and Analysis
- **4** Determine Internal Teams
- **3** Communicate and Evangelize the Benefits
- **2** Select Your Implementation and Training Partner
- **1** Gather Your Core Team

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1 Gather Your Core Team
Once your team identifies the need to make the move to a cloud-only platform like NetDocuments, it is time to pitch your idea to leadership and identify key roles who will be involved. Help each person understand what your organization stands to lose by 'staying the same', and what rewards and benefits you'll reap by moving to the cloud. Once you receive buy-in, others can then support you in communicating the advantages to others in the organization.

2 Select Your Implementation and Training Partner
NetDocuments only works with partners withwith years of experience in aiding firms of all sizes throughhout their change management journey. When selecting the best implementation and training partner for your needs, you'll want to look for a vendor that best aligns with your needs, communication style, and has experience helping similar sized firms with similar projects to ensure the most seamless experience possible.

3 Communicate and Evangelize the Benefits
Keeping consistent, transparent communication is key throughout any change event in an organization. It's important to educate others internally about why the change is happening (e.g. express current features lacking in the existing solution), and the benefits of the new system as a result. And, don't simply communicate this via an email! Host lunch and learns, create a brochure and/or video, and open office hours to allow for time for Q&A.

4 Determine Internal Teams
Identifying and involving key stakeholders for a change management journey from the start is critical to a successful DMS implementation. Take time to determine key roles and their involvement, and coordinate with your implementation partner to identify which power users and teams are best positioned to provide feedback for system architecture and environment testing.

5 Initiation and Analysis
Your implementation partner will perform system analysis and performance modeling to understand current data structures and identify any necessary system modifications to ensure your network supports a cloud environment. This stage is typically where you may identify any other preparatory projects (e.g. upgrading a network configuration), to ensure a smooth transition.

6 System Education
After the initial analysis, your administrative team will work closely with the implementation partner to gain a deep understanding of document organization, profiling, and security capabilities to identify the best system design for your organization.

7 Design and Build
This stage calls for strong collaboration between internal process and external technical experts. The implementation team will meet with key users to understand the specifics of a practice area's workflow, organization, and security needs. This feedback also helps determine how workspace templates and security measures are configured. The goal of this stage is to build the system in a way that ensures users can hit the ground running from day one, and easily locate content and documents most important to them.

8 Test and Acceptance
Once parameters are set and technical needs are met, it is time to migrate content into NetDocuments. This phase includes working with your implementation and training partner(s) to test migrations, quality control, and finalize training documentation.

9 Pilot
To ensure a seamless transition and identify any remaining roadblocks, your implementation partners will pilot the NetDocuments environment with a practice group or entire department. These pilots often include in-depth trainings to also help dial-in training methods for the rest of the organization.

10 Deployment
Once the pilot is complete, NetDocuments will be deployed to the entire firm. Deployment includes finalized training with your training partner, a transition to NetDocuments technical support teams, and regular meetings with your Customer Success Manager.

11 Work Securely and Safely — Anytime, Anywhere, Across the Globe
Once your documents are in the NetDocuments platform, your team will enjoy creating, editing, sharing, and organizing work from anywhere, on any device. Future updates to the software will be deployed automatically via the cloud in bite-sized amounts so as to note overwhelm your team while keeping them on the latest tech. With greater security and productivity, and a simpler way to collaborate on and share documents, both internal users and external clients benefit from cloud-based document management.

12 Ongoing Training and Support
To maximize this initiative's success, ensure user adoption remains high by keeping the training materials developed during implementation readily available for new hires. Train all appropriate roles from the start helps to ensure everyone can use NetDocuments effectively and operate at peak efficiency.

When the view rewards the journey, *That's Work Inspired.*

Ready to make the move to NetDocuments? Request a consultation today to learn more. With our expert partners, you'll be guided on the journey every step of the way, while enabling your teams to increase productivity, collaboration, and security.