

legalmatters

WEBSITE: legalmatters.co.uk

USERS: 20

PRODUCTS: NetDocuments:

DMS
ndOffice
ndClick
ndMail
OCR



Cloud-based DMS Drives Employee Agility and Productivity at UK Law Firm

ABOUT LEGALMATTERS

legalmatters is a UK firm comprised of solicitors specialising in Wills, Trusts, Powers of Attorney, Estate and Tax Planning, Estate Administration and Residential Conveyancing.

As a specialist private client firm, legalmatters offers quick, innovative, fixed-cost help with the legal aspects of family and wealth protection and management. The firm is forward-thinking when it comes to doing business online, meaning that technology is central to legalmatters delivering a high-quality legal service to its clients.

As part of the firm's ongoing digital transformation, legalmatters had decided to develop its own bespoke software. However, when it came to document management, legalmatters did not want to reinvent the wheel and was looking for a cloud-based system that would easily integrate with its custom-built workflows.

SECURE ACCESS FROM ANY LOCATION

Beyond integration, legalmatters was looking for a cloud-based document management system (DMS) to enable their personnel to securely access and search documents from any device or location.

“Prior to deploying the new DMS, we were only able to access documents remotely via a hosted desktop. If staff needed to access a document while out of the office or over the weekend, they had to go through the rigmarole of logging into the hosted desktop each time. We needed a cloud-based DMS that gave us great agility and security,” stated Martin Langan, Chairman & Innovation Director, at legalmatters.



“Prior to deploying the new DMS, we were only able to access documents remotely via a hosted desktop...We needed a cloud-based DMS that gave us great agility and security.”

Martin Langan
Chairman & Innovation Director, legalmatters



After an extensive evaluation of the DMS market, legalmatters concluded that NetDocuments best met the firm’s business requirements. NetDocuments’ consulting partner, Hoffbrand Consulting, then worked closely with legalmatters to move in excess of 300,000 documents to the new DMS.

FINDING THE RIGHT DOCUMENT THE FIRST TIME

NetDocuments has allowed legalmatters to easily create, view, edit and share documents on any desktop, tablet or mobile device without worrying that they are putting client data at risk. Furthermore, NetDocuments’ native integration with Microsoft 365 allows it to be used within legalmatters’ existing Office applications.

NetDocuments’ robust enterprise search and machine assisted filing functionality has helped legalmatters’ lawyers find the information they are looking for in seconds, rather than spending excessive time searching poorly filed electronic documents.

“The NetDocuments integration with our corporate email has made a significant difference. We are now able to save automatically incoming and outgoing emails in NetDocuments and the predictive filing has been brilliant. This has made filing client correspondence much easier, as we have full confidence it will be associated with the right documents,” stated Martin Langan, Chairman & Innovation Director, legalmatters.

One area where NetDocuments has come into its own is legalmatters' probate work. The firm still receives a significant amount of paper-based correspondence from financial institutions which needs to be scanned and saved as electronic documents. With NetDocuments extensive search capabilities, legalmatters is now able just as easily to



“In the past if we needed to find a particular document, we’ve needed to know specifically what it was called or where it was filed. But with NetDocuments we can find the documents we want in seconds, using much broader search parameters.”

Martin Langan
Chairman & Innovation Director, legalmatters



search scanned documents as it would native text files. This has proved particularly useful to legalmatters when it comes to reconciling payments, to the extent that the firm has found sums of money it previously hadn't been able to account for.

“In the past if we needed to find a particular document, we’ve needed to know specifically what it was called or where it was filed. But with NetDocuments we can find the documents we want in seconds, using much broader search parameters,” Langan explained.

ENHANCED IT SECURITY AND WORKFLOW

NetDocuments has also helped legalmatters enhance its IT security and workflow, as legalmatters can now share documents externally with clients using secure links which makes communication much safer. legalmatters has also benefited from integrating DocuSign with NetDocuments so clients may sign documents electronically rather than sending them in the post, saving both the company and clients significant time and effort when it comes to corresponding with each other.

BROADENING THE TALENT POOL AND DRIVING A POSITIVE USER EXPERIENCE

Like many businesses, legalmatters is dealing with the disruption of the global COVID-19 pandemic. However, its implementation of NetDocuments has played a big part in enabling the firm to continue 'business as usual' operations despite employees being

unable to work from its office. This flexibility has also allowed legalmatters to widen the net when it comes to recruitment, as where a candidate is based is a lot less of a factor.

“We recently recruited a new member to our probate team, and for the first time we decided that we weren’t going to restrict the search to people who could reach our office. This enabled us to employ the best person for the job regardless of where they are located and also increased our geographic footprint. Products such as NetDocuments really help level the playing field when it comes to talent and client acquisition,” Langan states.



“If you ask anybody in our firm about going back to our old DMS I don’t think there would be any takers.”

Martin Langan
Chairman & Innovation Director, legalmatters



At present, legalmatters is only scratching the surface of what its employees can do with NetDocuments, but the firm expects further benefits to be realised once COVID-19 ‘lockdown’ measures are eased.

As Langan states, “NetDocuments is one of the building blocks around how we want to serve our clients. Employee feedback to date has been very positive and I’d expect to hear more once people are able to meet physically with clients again as they start accessing documents on the go via their mobile device. If you ask anybody in our firm about going back to our old DMS I don’t think there would be any takers.”

WORKING WITH A PARTNER

Both legalmatters and Hoffbrand Consulting belong to a consortium called Baskerville Drummond Consulting Group and it was at a gathering of that group where Martin and Paul met. Paul demonstrated the system and it became obvious that NetDocuments was the platform and that Paul Hoffbrand, as a NetDocuments Consulting Partner was best placed to implement the system.

Paul’s standard implementation methodology was used to get the system up and running quickly. He then worked with the legalmatters team to integrate into the practice management system and migrate the documents in.

On go-live day, Paul and Martin were online with all the staff and Paul ran the user training. Once that was over, the teams went back to their PCs and both Paul and Martin were available to remotely floor walk and answer any questions that arose.

“Working with Hoffbrand Consulting has proved to be really valuable to us. Paul’s knowledge of the system is extensive, and he offered us great advice during the implementation, migration and training phases. His ability to respond quickly and accurately to issues was enormously helpful to us, so much so that we have awarded Hoffbrand Consulting with an ongoing support contract.

We feel very well served by Hoffbrand Consulting and it is comforting to us knowing that NetDocuments backs him up,” concluded Langan.

ABOUT NETDOCUMENTS

NetDocuments is the leading cloud-based document and email management solution to securely store and organise documents on a single platform. Backed by 20 years of experience in cloud innovation, over 2,750 companies worldwide trust NetDocuments 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.

ABOUT HOFFBRAND CONSULTING

Founded in 2009, Hoffbrand Consulting is a certified implementation, training and consulting partner for NetDocuments and provides an open, honest and valuable consulting service to law firms and at a reasonable cost. For over a decade Hoffbrand Consulting has successfully implemented NetDocuments at firms of all shapes and sizes across Europe and the Middle East. Their defining ethos - keep it simple but provide the highest level of service and support available - applies to each and every implementation.