



DMS Implementation Best Practices:

Building a Roadmap for Continuous Success

Which Wrongs Would you Right!

Presented by

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Lessons learned: Which Wrongs would you right?

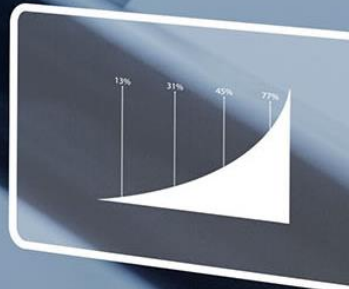
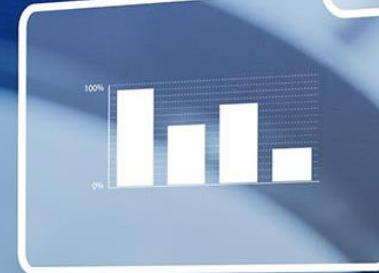
Which Wrongs?

- Selecting the Wrong Product?
- Ignoring Information Governance?
- Neglecting User Adoption?
- Carrying Forward a Bad Design?
- Leaving Users Without Search?
- Loosing Momentum
- Becoming Static, Ignoring "Phase 2"
- Squandering the Investment?

Selecting the Wrong Product?

To do it right:

- Define business drivers and selection criteria
- Consider your investment horizon
- Think Transformation
- Evaluate the vendor ecosystem and approach
- Weigh market share and market momentum
- Consider vendor's ability to Innovate
- Consider vendor's ability to Execute
- Examine cloud experience, operations, architecture and vendor technologies
- Determine TCO and ROI
- Obtain executive support



Information Governance

To do it right:

- Evaluate your IG program and goals
- Establish or update IG policies to meet security, client and regulatory demands
- Define a small number of approved repositories
- Make the matter workspace the single electronic file
- Migrate external content to the DMS where appropriate
- Manage email like the client data that it is
- Apply retention and disposition
- Implement system controls – DLP, walls, holds, etc
- Store matters in local jurisdictions as needed
- Incorporate change management and user adoption techniques
- Establish IG Monitoring and Governance



eSentio's Information Governance Model

Focus on User Adoption

To do it right:

- Design workspace and security based on IG policies and requirements with user adoption in mind
- Analyze workflows and develop a change management plan based on practice needs
- Conduct a Change Impact Analysis and develop a comprehensive Change Management plan
- Integrate change plan, communications and training
- Frame the project in terms of business goals
- Embed the change through monitoring and governance



eSentio's User Adoption Model

Don't Carry Forward a Bad Design

Do it right: Don't just "lift and shift"

- Re-analyze user needs and workflows
- Organize content based on practice, business, IG and security needs
- Reduce number of doc types and eliminate catch-alls
- Correct IG and security ahead of migration
- Design workspace with security, search and KM needs in mind (do you need need-to-know? etc)
- Focus workflows on the matter workspace:
- Migrate folders from legacy DMS as a transition strategy, but allow NetDocs filters to stand alone
- Automatically relink Outlook folders to the matter workspace to encourage email filing
- Recreate cross-workspace document links



Don't Lose Momentum

To do it right –

- Understand that there will always be a Phase 2 and beyond
- Plan for Phase 2 before Phase One is completed
- Understand that Change Management and User Adoption is a process that will out-live your implementation
- Plan your journey to steady state
- Identify your change and user adoption programs as “constants”

Don't Become Static

To do it right –

- Take advantage of new vendor capabilities
- Constantly assess your users' and client's needs
- Leverage the “ecosystem” of industry advancements
 - DocuSign integration
 - SetBuilder
 - CollabSpaces
 - PatternBuilder
 - DLP
 - MS Teams sync
 - Document assembly & automation
 - Workflow
 - ndThread



Leverage the Investment

To do it right:

- Embed the change through an ongoing user adoption program
- Monitor activity through a usage dashboard
- Periodically adjust system design to meet changing requirements
- Leverage the platform for all matter content
- Take advantage of the full platform capabilities
- Conduct Periodic Reviews

Summary

- ✓ Develop the business cases based on business drivers, ROI and executive support

- ✓ Select a DMS with a single instance platform that stays ahead of the curve

- ✓ Align the project with information governance and security requirements

- ✓ Develop a change management program for user adoption

- ✓ Deploy effective enterprise search

- ✓ Make the matter workspace the focus of workflows and integrated applications

- ✓ Customize the matter workspace to practice group requirements

- ✓ Leverage transition strategies like folder migration and linking

- ✓ Embed the change with a phased program of continuing enhancement

Thank You

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