



NetDocuments supports Ellisons Solicitors in meeting their document management objectives

Helping them achieve full remote working efficiency

Experienced, creative, practical lawyers

At Ellisons Solicitors we've been providing first-class legal services and advice to clients for more than 250 years. Today, we have six offices throughout Suffolk and Essex, and have been recognised as a leading law firm in the Legal 500 and Chambers. We've also secured the Law Society's International Standard for excellence in legal practice management and client care, Lexcel, as well as being recognised by the Law Society's Conveyancing Quality Scheme.

Integration partnership

Our firm has been using Partner for Windows (P4W) practice and case management for some time. It provides a foundation for the way we work by supporting all aspects of our firm including matter and client management, accounting and billing. It sits at the heart of our firm and we couldn't do business without it.

One of the many benefits of P4W is its ability to incorporate other systems. When we investigated the deployment of a new Document Management System (DMS), we decided that NetDocuments was our preferred product because it integrates so smoothly with P4W out of the box. That was a significant benefit to us.

The business case

If you go into a partners meeting and ask who wants NetDocuments, everyone puts their hands up. And then you need to tell them about the resources required. To manage this, we have a process we move through when we are making any significant spend. We put all of the required information into a form and it goes to the management board, and then to the equity partners to agree and sign off.

The key thing we focused on was on the inefficiencies we were trying to overcome. How was NetDocuments going to help and what did that equate to in terms of resources? We started by looking at people's rates, the time spent doing various tasks and the benefits gained by other firms who've implemented NetDocuments. We added in additional benefits such as a reduction in paper and print costs and the floor space saved by the removal of physical documents.

It's difficult to quantify everything, but the key elements we measured were hourly rates and the amount of time spent on repetitive tasks that would be removed by a DMS. Once we started calculating what we could do with those hours, and the amount of fee income that would bring in, the business case for NetDocuments was made.



Client >

Ellisons Solicitors

Sector >

Legal

Project >

Integrating NetDocuments into P4W

“When we think about our goals of achieving one source of truth, becoming more organised, increasing efficiency and starting the journey to a paper-light environment, NetDocuments has helped us achieve everything we set out to do.”

Ian Burrell >
Director of IT >
Ellisons Solicitors >

Issues to solve

Previous to the adoption of NetDocuments, we were working with networked shared drives. This meant that we had some information in email format, some in paper files, some on the shared drives, some not. We had a lot of paper files and all of the obvious resource issues associated with managing them. Even more importantly, there was no overriding intelligence across our system and we needed one source of truth for every item pertaining to a matter.

Product investigations took place during the Covid-19 pandemic. Our IT team had worked hard to enable comprehensive remote working for our people but we couldn't overcome the issue of having to come into an office to access physical files. It was the last piece of the jigsaw in terms of full remote efficiency.

Choosing NetDocuments

Externally, we did look at other systems but ultimately, we decided that NetDocuments was the best choice for two reasons.

The first was security. After a thorough investigation, we came to the conclusion that NetDocuments offered the highest levels of document security available.

The second reason was just as compelling, and it is that NetDocuments was built for the Cloud.

During our digital transformation, our IT team has moved us firmly into the Cloud to enable any time, any place working. Unlike competitive products, NetDocuments is a true native Cloud system and this made it a very good fit for the way we work.



Making the change

Implementation was extremely unusual because it was completed during the pandemic. To put it into perspective, we had only one physical meeting that took place during a gap in lockdown restrictions. Previously, we would have thought that the full implementation of a new system could not be done remotely but now we know that yes, it can.

Getting everyone into an office meeting room would probably have been more difficult than contacting them via video conferencing, simply because of the multiple parties that needed to be involved. As our implementation partner, Advanced has told us that it ranks within their top two or three deliveries because of the unique offsite nature of the project. This implementation challenged the status quo and proved that the successful delivery model, which has always been followed, could be achieved in a new way.

Supported adoption

Implementing NetDocuments was one thing but on top of that, the training and support was fantastic and the go-live was successful.

The training was delivered virtually through test systems. We completed the process shortly before the system went live, so there wasn't enough time for users to forget everything they had learned! As well as online training, we created online videos and how-to guides, we put up posters in offices and sent out training material for people to keep on their desks. We also had a support package in the background to look after management board members just to ensure everyone was comfortable. This effort really paid off.

Our only anxiety was related to doing this during lockdown. We didn't know how it would work out. Usually, we would have floor walkers going around talking to people to make sure everyone was okay with the new technology. Our concerns were unfounded, and it was one of the best training projects we've done.

It did take some users a bit of time to adapt to the move from a shared drive as they weren't used to the confined structure and control that NetDocuments offers. They have adapted, and it has been very successfully adopted by our firm's users.

Benefits gained

When we think about our goals of achieving one source of truth, becoming more organised, increasing efficiency and starting the journey to a paper-light environment, we've achieved everything we set out to do.

By moving all the information within the NetDocuments assignments, we are now able to file emails at the point of sending and to place all documentation within the correct matter workspace. We have started to replace physical paper files and all of the problems and costs associated with them. NetDocuments has allowed us to work much more productively.

We've also gained the advantages of smooth collaboration. NetDocuments allows us to share documents and information easily with both colleagues and clients, no matter where they are. We no longer have to search for paper files or emails and there's no need to photocopy and deliver them. This alone has saved us hours of time.

Ongoing support

Both NetDocuments and Advanced have been first class before, during and after the process, and it's not often you can say that. On a lot of the implementations we've done in the past, we've found you get a lot of attention beforehand, some attention during, and afterwards it all falls away. We've been happy all the way through and we are still being supported. Our account manager is always proactive and ready to assist when necessary.

We have no hesitation in recommending the benefits of NetDocuments to other firms.

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