DMS Best Practices

FROM THE INDUSTRY EXPERTS

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TABLE OF CONTENTS

DMS Best Practices
FROM THE INDUSTRY EXPERTS

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INTRODUCTION

For over a decade, NetDocuments has advocated that true cloud technology, offered through a Software-as-a-Service (SaaS) model is a superior way to deliver document and email management (DMS) to firms of all sizes.

A native cloud service leverages a one-to-many technology infrastructure, justifying the investment in best-in-class enterprise technology as it is used by the vendor's entire global customer base– as opposed to on-premises or hosted system which requires additional modules, configuration, and complexity when adding critical functionality such as mobility, security, search, and collaboration.

NetDocuments continues its rapid global growth, as firms realize the benefits of moving to a true cloud model that leverages the power of enterprise technology with built-in matter-centricity, search, business continuity, mobility, collaboration, and a security and compliance infrastructure which far exceeds what a single firm can achieve on its own.

Firms engage with NetDocuments for a number of reasons, but whether it's because of aging hardware, upcoming maintenance of an on-premises system, low user adoption, or frustration with the firm's current DMS, firms are turning to the cloud for improved efficiency, adoption, security, and usability for the missioncritical application of the DMS. Once a firm performs their due diligence and selection of NetDocuments, they embark on the implementation and technology change management process related to upgrading a DMS – which this whitepaper will address.

Switching from an on-premises or hosted system requires planning, expertise, and assistance from experts who not only know the intricacies of the DMS world, but who also understand the legal technology landscape within a firm, and how the different applications integrate and interact across individuals, devices, practice areas, and office locations. The value-added ingredient of having third-party experts involved in the DMS deployment, consulting, and training across the firm is often the difference between a successful planning and DMS deployment project or a project that stumbles and costs the firm in lost time and money.

We reached out to the NetDocuments Certified Channel Partner Community to weigh in on DMS implementation best practices and answer some of the questions firms may have when considering switching to the cloud. These are experts in their field and have many years of experience working in the legal technology space and seeing firsthand how technology has transformed the practice of law.

We hope you enjoy this article and glean valuable insight (and potential consulting partners) you can use in your next technology project.

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Maximixing Information Governance
THROUGH USER ADOPTION

Joshua Fireman

PRESIDENT
Fireman & Company

Fireman & Company

Information governance would be fantastically successful in most enterprises were it not for people.

After all, the rest of information governance, or IG, can be established with limited human involvement:

- **Policies?** Hire an IG professional.
- **Procedures?** Hire an IG professional.
- **Processes?** Hire an IG professional.
- **Controls?** Select systems and design workflows.

…and then you get to adoption.

User adoption should be approached as a concert of activities that begin at the outset of your IG project and continue as a part of your ongoing operations. We recommend the following adoption planning best practices:

1. **Go beyond policies, procedures and processes.** You need to address how people work, and how your changes will integrate into their workflows. Be practice or department specific; develop personas and use cases. Yes, this is a lot of analysis – but it's also the main difference between success and failure.
2. **Communicate** (at various organizational levels) and clearly map out the reasons why the project is being undertaken, the methodology being used and the expected impact on daily operational norms.
3. **Data cleanup and migration** must be handled with the utmost care and attention to your users' ability to work smoothly.
4. **Solution testing and benchmarks** are required to ensure that your use cases are met and that there is a baseline state to which regression testing and rollback plans can be successfully mounted.
5. **User-focused training** must account for the "care and feeding" of your IG solution and the ability to successfully use it in day to day operations and workflows.
6. **Demographic segmentation** is critical to long-term adoption. Your users will change at different rates; some people will hit low adoption caps while others will eagerly move from one usage level to another. Your users are not a monolithic group; you need training and assistance to help people move at different paces.
7. **Perpetual reinforcement is critical;** IG is not a one-off change. Additionally, your organization will add people over time; new arrivals must be provided the same level of adoption attention as those who were there on Day 1.

Experience shows that people are willing to change, when the change makes sense, drives benefits and build on existing work habits. Adoption succeeds when we take the effort to understand, analyze and support our colleagues.

That's a very human approach.

Fireman & Company

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Assessing Your Technology Landscape

Jason Mills

DIRECTOR
BlueSky Legal

When it comes to making any decision relating to a change in technology, understanding your current landscape could be your most important step.

By understanding your current landscape it puts you in a better position to evaluate the impact in cost and efficiency of the proposed technology change.

The factors to consider in your current environment should include:

1. Your overall technology cost AND cost per application
2. Your licensing methods, costs, entitlements and expirations
3. Technology contract costs, expirations and termination clauses
4. Age of existing hardware, both server and desktop
5. Current application support arrangements and utilisation figures

During this discovery process, it is very common to find:

1. Applications that you have been paying for but not using or worse, applications that you are using but not licensed to use.
2. Applications that cost significantly more when you factor in the cost of the infrastructure that they require. This is very typical of onsite document management systems.

Once armed with this information, it makes the process of selecting, evaluating and calculating the cost benefit of a new or replacement application much easier. Ensuring that the advice you provide assists the firm in making the best possible decision from both a technological and financial standpoint.

Tony Foy

MANAGING DIRECTOR

Peregrine Cloud

What to Watch For

IN A STATEMENT OF WORK (SOW)

A Statement Of Work (SOW) should be agreed before the project starts.

The purpose of the document is to clearly define all aspects of the project, for both client and consultant to sign off. Nothing should be left out and there should be no room for conjecture – no one wants disputes between client and consultant.

The scope of the work should be detailed, showing each main activity, who is responsible and the planned completion date – to enable planning and resource assignment. Anything that is not included should also be clearly stated. To aid in visualisation further, I would also include a gantt chart that shows the project in pictorial form.

All of the deliverables to be provided should be listed (e.g. training materials, custom documentation), as should anything not to be provided (e.g. computer hardware, operating software, etc.) Again, leave nothing out.

Any known potential extra cost work or deliverables should be separately listed as such, and the basis for charging for them should be clearly stated, together with the process for approving their provision.

Ensure the training approach is clearly stated. More than 90 minutes introductory training, would be too much information for users to absorb up-front, so let your users work with the system for a while, before engaging with them for further training.

The approach to be taken to import documents should be detailed. If documents are to be imported from file systems, how well organised are they and do they permit the systematic identification of document metadata from the folder or document names? If not, then perhaps a folder Import would be better to import your documents as-is, then allow users to move them into workspaces at their leisure. Clarity is needed on the approach to be taken, to set expectations on both sides.

Ensure there is a one page summary of all costs, to ensure that both sides are clear on all the expected costs of the project.

Ensure the payment milestones and dates are defined. Clarity on when payments are to be made and under what circumstances ensures focus by both parties on the steps preceding payment, leading to a successful project and a better client-consultant relationship.

Closing a project can be contentious. Include a signature block for each milestone, so that both parties are focused on ensuring each milestone is genuinely complete. If the client has to sign off that each milestone is completed, then the client will take a strong role throughout the project. Project signoff is then a simple matter of signing off the last milestone.

Sue Keno
VICE PRESIDENT
Keno Kozie Associates

The Importance of Software Integration

In today's day and age, when firms want to stay ahead of the game they need all their systems to work synchronously. Software that is not integrated and thoroughly tested results in significant increases in cost and resource consumption.

Defining systems/application integrations is the first step in explaining its importance. Understanding the business needs and determining the best technical strategy for implementation is a key component to the success of any software integration. Here are some important points to consider:

1. **Choosing the best software for a need**
   Knowing what products are available for a solution is important. And knowing which ones are the best solutions is equally important. Reach out to independent integrators/consultants that are often not tethered to any one vendor, they act in the best interest of the client and advice based upon their own experience in the marketplace.
2. **Improving the quality and reliability of an integration project**
   No one person or organization knows everything. Software integrations need to have an understanding of mechanical/technical, process and business intelligence issues and knowledge on how to integrate those disciplines into a working solution. A common mistake is when software is acquired without the technical team's involvement. Improve the overall quality and cost of integration by including the technical team from the onset.
3. **Having the right skill set**
   Project management, quality control and execution skills are very different skill sets. Software integration requires all. Prepare a comprehensive plan for initial deployments and updates to incorporate each of these components. Long term savings come with proper planning, testing and execution.
4. **Saving on implementation costs**
   Should independent system integrators be utilized? If a firm does not have internal expertise to deploy, test and remediate the firm should evaluate the integration strategy and considering bringing in outside help. This could potentially save the cost of hiring and allows the implementation to be handled by an expert with a vast knowledge base.
5. **Accountability for time and resources**
   Track and learn from the beginning. Use historical practices of software integrations in the firm to improve those practices on an ongoing basis. Apply a budget to an integration project regardless if utilizing internal or external resources. Software integration is end user/firm-wide business impacting. If it does not work properly, the loss could be substantial. One should be accountable and tracking historical practices to minimize failure repeats. Whether software integration projects are fixed or variable, costs, labor and materials should be managed based on an upfront plan and budget. Software integration projects should always have definition of product, scope and also an associated cost structure. When a project is implemented by internal staff, accountability is often minimized. An attitude of 'it'll take as long as it takes' can exist, and in turn budgets and schedules often suffer. Use a project approach for software integrations regardless if it is a new application or an update, the benefits will be significant.

Growing Up to the Cloud: Key Strategies

TO A SUCCESSFUL NETDOCUMENTS DEPLOYMENT

Rajiv Mukerji

DIRECTOR OF DOC. MANAGEMENT SERVICES

eSentio

As the 21st Century reaches its teenage years, law firms are also maturing – and, in unprecedented ways.The ever-increasing global reach of the world's largest firms, coupled with the mobility of their attorneys and security concerns of their clients, necessitates technology that can meet these demands and the needs of the next-generation workforce.

One clear emerging trend is a move to cloud-based Document Management Systems. eSentio has extensive exposure to the intricacies and capabilities of cloud applications, and we understand the challenges and key strategies to successfully deploy them. eSentio has embraced this trend, and lead our clients to successful implementations of cloud DMS platforms with comprehensive tools and processes that fully address these platforms' inherent complexities. This article focuses on general challenges and best practices to successfully deploying any cloud based DMS while providing additional insights into one of the innovative and interesting solutions in this space: NetDocuments.

Key Challenges

Along with its rewards, rolling out a cloud-based DMS has challenges present in any major technology change – challenges that are amplified when framed in the context of moving to a cloud-based platform. There are also unexpected challenges that are introduced with this paradigm shift.

To address these challenges, a successful deployment strategy should anticipate:

- Gaining executive sponsorship and support for this major change, preferably in the context of the firm's information governance program
- Addressing legacy data integrity and consistency issues
- Considering data mobility, privacy, and security in an off-premises configuration
- Anticipating application integration challenges in a maturing ecosystem
- Considering all possible use cases in and out of the office and the user experience
- Considering the project complexity;
- Designing a comprehensive change management and communications program

Failure to focus on these challenges with a solid plan of attack will lead to suboptimal results, poor user adoption, and transferring existing data integrity issues to the cloud environment.

Key Strategies

eSentio's broad experience with DMS deployments has shown the following strategies are integral for success:

- Developing a comprehensive gap analysis for features and functionality
- Anticipating and planning for sufficient migration lead time, especially for flash cutovers
- Improving user adoption and collaboration
- Improving overall client file management maturity
- Improving email management

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- Improving the mobile and offline experience
- Developing a robust plan for unique application integration challenges
- Improving data collaboration with external parties, privacy, and security with comprehensive policy, process, and tools; evaluating non-DMS content and appropriately addressing it
- Evaluating administrative tools and reporting requirements early in the planning process
- Developing a repeatable quality assurance strategy to handle NetDocuments quarterly updates to gain full advantage of the high rate of NetDocuments innovation and improvements.

Key Success Factors – Business, Technical, And Execution

Key criteria for a firm to succeed in launching a new cloud DMS technology include three distinct, yet interconnected groups of factors.

First, the business success factors:

- Frame the project in terms of the firm's key business drivers rather than as a pure technology project – include drivers like: Information Governance, Professional Responsibility, Risk, Mobility, and Security;
- Comprehensive, ground up design - involve practice groups and administrative staff from Day One;
- Consider the full matter lifecycle; and,
- Carefully select the pilot groups.

Next, the technical success factors include an assessment of the legacy DMS and:

- Attorney/staff work models;
- Metadata types and cleanliness – attaining data consistency, and addressing "broken" objects;
- Data volumes, application types, and file sizes; and,
- Application integrations and requirements.

Finally, the keys to successful project execution in a deployment include:

- A comprehensive change management/communication program;
- A detailed project management approach, to coordinate Firm and external resource tasks;
- A rigorous QA process – basing test scripts on actual use cases.

Conclusion

While the move to a cloud-based DMS offers significant advantages, there are also inherent challenges which require significant effort to achieve successful results. The NetDocuments team has worked hard to develop a robust solution addressing the data mobility, security, and accessibility needs of the world's biggest law firms. With the experience and expertise of our team, eSentio has developed a series of best practices to ensure our clients realize maximum value from their Cloud DMS investment. Leveraging our respective organizations' people, expertise, processes, and tools ensures our collective client base will have a smooth transition to the cloud DMS, and excel in the legal marketplace with the technology supporting client service and mitigating risk.

Peter Leiber

CEO
EIM International

Common Pitfalls When Deploying
A DOCUMENT MANAGEMENT SYSTEM

At EIM International, we hear a wide range of expectations from our clients.Some think that a successful DM deployment will be easy: simply load the software and we are done! Some anticipate a difficult road, with technology hurdles, a huge expense or, worst of all, major cultural upheaval.

From our perspective, a DM deployment does not have to be overwhelming, and you can embrace the implementation as an opportunity rather than approach it with fear. You will enjoy the flavor of success by seasoning your recipe with careful forethought and planning.

Here, we share some common-sense insights to avoid pitfalls as you embark on your journey. If you think about committing to a DM system as a marriage, these tips will ensure that you escape Frank Sinatra's maxim about marriage: "A man doesn't know what happiness is until he's married. By then it's too late."

Pitfall #1: Neglect Your Users

Even though much of a document management deployment occurs behind the scenes, at the end of the project, its success is ultimately tied to adoption by your users. The best strategy for avoiding this pitfall depends on your culture, but both are rooted in the same philosophy: Be deeply intimate with your users' needs. Some clients take an inclusive approach: enlist users in an advisory panel, and document the consensus of the majority. Others apply the Steve Jobs approach: start with excellent research, know and predict your users' needs, and deliver excellence above and beyond their expectations.

Next, invest in a killer promotional campaign. Ensure that people know what is coming, and why, and most importantly how they will benefit from using the new DM system. Build it on a catchy theme like "Take a New Look" and elaborate with a tagline like "A fresh face with unprecedented document control!" Let them know specifically how it will be better than what they've used over the last 20 years. Seriously, Promote Enthusiasm!

Pitfall #2: Ignore the Details

"We think in generalities, but we live in detail." (Alfred North Whitehead). To deliver a useful, intuitive DM, it must address the details. Expect your integrator to elicit information and foster good dialogue that helps them best hit the mark.Prioritize the features that are most critical, and plan for how you will handle details behind areas such as:

- Metadata to drive document organization
- Simplified retrieval [consider "Recent Documents," "Recent Emails," or "Recent Matters"]
- Advanced search [Google-like and Boolean search]
- Integrated applications
- Security model
- Sharing [internal sharing, external publication, external collaboration]

At every step, consider what you can simplify. Can you reduce the number steps to save a document? Can you show search results with fewer clicks? Think about the details, organize the results, and then review them again to make sure that you have it right.

Peter Leiber

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Peter Leiber

CEO
EIM International

Pitfall #3: Under-Estimate the Effort

At EIM International, we met a CIO shortly after he completed a firm-wide rollout of a new DM system. He was now under tremendous pressure, and he asked us to assist with extensive troubleshooting, user training, ethical wall automation, and document migration from their old system. In other words, there were large categories of tasks that weren't part of the initial rollout, now causing user dissatisfaction. We helped him with the Sisyphean task of changing people's negative perceptions – all of which could have been avoided had the effort been scoped properly in the first place.

DM deployment projects can range in scope depending on a number of factors, and your commitment to a well-defined project plan will avoid misaligned expectations. Ensure that you have the proper resources not just available on staff, but prepared and dedicated to the project. Validate that your timeframe makes sense based on other concurrent initiatives which may require attention from overlapping personnel.

Pitfall #4: Neglect to Hire the Right Expertise

We know that there are some pretty savvy people on your team, and you might be inclined to try to go it alone. In-house teams are absolutely the best specialists for keeping the current systems optimized and ensuring high client satisfaction. Outside consultants, however, are the ultimate specialists in implementing systems. We find that the most successful projects are those that meld the best of each team in a true partnership, combining the integrator who has the product expertise with your staff who has the userfacing expertise.

Of course there will always be surprises that just cannot be avoided. Remember, "When you come to a roadblock, take a detour." Knowing the most common pitfalls in advance can make the difference between a successful project embraced by the community and one that haunts you painfully with one bump in the road after another.

Here's to your success!

Brian Podolsky

PRACTICE MANAGER, ENTERPRISE CONTENT MANAGEMENT
Kraft Kennedy

Common Pitfalls When Deploying
A DOCUMENT MANAGEMENT SYSTEM

As a trusted advisor to law firms and legal departments, we don't take our role lightly.

It's not about just being a systems integrator. It's not just 1s and 0s, registry keys and database rows. There is more to a DMS project than simply installing and configuring client software dialog boxes. There are decisions to be made with regards to the firm culture and workflows, and these decisions will ultimately decide if the DMS project is a failure or success – regardless if your system is sized properly, or installed following the vendor's Installation Guide documentation.

What metadata should be tracked for each document? How can these be automatically added, based on a data source? What organizational structure should be developed that makes it abundantly clear to determine where a document should live, yet can display some representation of the matter lifecycle?

The process of reaching these decisions should include input and feedback from various key project stakeholders. Practice or department leaders, office managers, the records manager, and the risk manager are just an example of the kinds of people to include in the design aspect of the DMS solution. Not only will it provide them with "skin in the game", but it will provide a true understanding of the firm's document and process workflows.

It's important to remember that when designing profile information and structures, it is often best to go with a "less is more" approach. General, but clear, classifications will increase user adoption and decrease the learning curve during rollout and when onboarding new employees.

On many occasions, Kraft Kennedy has stepped in and redesigned structures that were either too complex or not designed with the Firm's workflows and processes in mind. They caused confusion and frustration among users, and soured what otherwise may have been a technically-sound project.

Failures When Deploying
DOCUMENT MANAGEMENT SYSTEMS

Jim Turner

PRESIDENT
Hilltop Consultants

One of the most frustrating challenges when deploying a document management system (aka DMS) is to have invested months of time and money, only to later find out that your staff are not using, or even bypassing the new system.

It's all about training...

In our many years of supporting law firms and legal institutions, we have discovered that the key to a successful DMS deployment is training. We have found that clients who make full participation in training mandatory have a much higher deployment success rate. And, clients who do not mandate training often end in failed employee adoption (and a lot of wasted money).

Furthermore, we have believe that the best implementations occur when employees are encouraged to be involved in the process early. Allowing your employees to be involved in areas such as system design and workflow, can lead to high engagement and consistency in the following of rules regarding its use.

And, this is not only the case for document management systems. Other centralized solutions such as CRM and ERP systems have the same challenges for the same reasons. Document management systems can be extremely complex. Outside of the core system, integration with 3rd party solutions such as Microsoft Office, Adobe, etc. must be considered.

Working with a professional IT organization that has a successful track record of deploying and maintaining document management systems in your industry, can help you get up-and-running quickly. More importantly, they can help you avoid deploying the wrong system, or making a terrible (and costly) investment. We also recommend choosing a partner that invests in continual training and support.

Avoiding pushback

You will always have pushback when it comes to convincing members of your staff to attend training. Here are some tips to get full participation.

1. **Make sure they see the benefit.** A new DMS system training will have a much higher attendance if employees are excited to use the system, and can see why it will benefit them in their daily tasks and responsibilities.
2. **Have training that is tailored to their particular function.** In most firms almost everyone will use a DMS differently depending on what their role is within the company.
3. **Make sure that Senior Partners of the firm will attend training.** This will raise the level of importance of the training, and employees will be more likely to participate.
4. **If you have staff that cannot make the initial training, schedule ongoing lunch-and-learns and micro training sessions.**

eLearning, Remote Training, Onsite
OR ALL THREE?

Jeffrey Roach
PRESIDENT
EncoreTech

encoretech

It seems that those of us in Legal have been filing documents away into the Document Management System (DMS) forever.

This familiarity with the concepts of a centralized document repository might cause you to underestimate how much training will be required when you make the move to NetDocuments. Some people have even wondered if they could skip training altogether. A word of advice? **Don't!**

Conceptually your users may be familiar with how a DMS works. They may even be storing files in the cloud using commercial products like Dropbox or One Drive; however, at Encoretech we have successfully completed over twenty NetDocuments projects and we can tell you from experience that the mechanics of NetDocuments are different. NetDocuments combines the security and stability of a traditional DMS with the convenience of the cloud. In other words, a modern, browser-based document management system that's seamlessly integrated with your favorite Office applications. This flexibility is one of the reasons firms are flocking to NetDocuments; however, it is also the reason why users will likely struggle without adequate training.

Make a Plan

We recommend you develop your training strategy using three phases: pre-rollout, rollout and post-rollout. The pre-rollout stage is a great opportunity to take advantage of eLearning. Conceptual pieces like Getting Started with NetDocuments introduce learners to new concepts in NetDocuments and compare and contrast them with their current system. This is also a great time to offer first-look webinars. Encoretech trainers have being working with NetDocuments for over a decade and our webinars demonstrate that, in the hands of someone who knows what they're doing, NetDocuments is a powerful and easy to use document management system. There's also nothing quite like seeing it in action to generate user excitement.

As you move into rollout, face time with qualified and engaging instructors becomes more important. In a law firm or other professional organization, it's impossible to overestimate the value of legacy work product.When you start make changes to the way people open and save documents they are going to get nervous.

At Encoretech we believe traditional instructor-led classroom training followed by hand's on deskside support is still the best way to help people make the transition to NetDocuments. Post-rollout is all about anchoring key concepts and expanding learners' use of the system. This can be easily accomplished with on-demand eLearning titles like Optimizing the Home Page in NetDocuments, or Tips and Tricks for Searching. The great thing about these kinds of topics is they can also be delivered remotely, using a web-based screen sharing application. Different people respond differently to selfpaced versus guided learning. At Encoretech we've discovered that by offering a mix of on-demand and live learning opportunities before, during and after the rollout you substantially increase the likelihood of engaging learners and providing them with a positive experience as you make the move to NetDocuments.

End-User Training
KEYS TO SUCCESS AND COMMON MISTAKES

Doug Striker

CEO
Savvy Training

SAVVY TRAINING
& CONSULTING
More than just smart

Creating a Culture that Values Ongoing Training

Often, you must create an entire culture shift in your firm in order to create a successful training program.

Here is a step-by-step guide for instituting culture change throughout your firm:

- **Form a technology committee:** This committee should include representatives from across the firm to help design and launch a new training initiative.
- **Administer individualized assessments:** People do not want to relearn skills they already know. (And wasting staff time will quickly kill a culture shift.) The key to removing apathy is to tailor instruction to each person's skill level. To do this, you need to assess them individually first.
- **Increase attorney participation:** The committee and assessments should be used to encourage attorney participation, helping them to understand the impact that improved technology efficiency will have on their workflow and output.
- **Create customized training:** Using the assessments, create customized content for more tailored trainings. With the right delivery capabilities, people could complete their trainings while sitting at their own desk rather than having to attend a class, also improving efficiency of the training efforts.
- **Award certifications:** People who achieve various levels of technology proficiency should receive certifications for their accomplishments. (These certifications could ultimately be used by the marketing department to tout the firm's technological advantages over the competition.)

Savvy Training & Consulting can help set you up for success by assuring that the training you provide actually moves your people and your firm forward.

eLearning is a Science

Creating effective, efficient continuing education experiences for adults is time consuming and filled with peril! Expectations are huge for adult learners.

But how do you make their learning time effective? By hiring an experienced training partner. Why does it help to have a partner with experience? Because eLearning professionals study things like…

- The **Multimedia Principle** (Mayer, 2005), which states that people learn better when words and pictures are presented, and they learn more deeply when appropriate pictures are included with words.
- The **Split-Attention Principle in Multimedia Learning** (Ayres & Sweller, 2005), which indicates that different cognitive resources are used to interpret words and pictures. In order to avoid overload, the words and pictures must be related both in context and in location.
- The **Modality Principle** (Low & Sweller, 2005), which addresses the fact that working memory islimited, yet vital to learning new information. Discovering methods for increasing working memory will increase the ability of students to absorb and retain new content. When the visual and auditory senses work together, more material can be handled in each channel and facilitate movement of the information into long-term memory.

Paul Unger

PARTNER
Affinity Consulting

End-User Training

KEYS TO SUCCESS AND COMMON MISTAKES

The best designed DMS will not mean a thing if you fail to deliver excellent end-user training.

End-user training is where the true rubber hits the road when it comes to organizational buy-in. Here are tips to ensure great end-user training.

1. **Written materials.** While custom written materials take a lot more time, it is critical that users have materials that are short, concise and have a place where they can take notes.
2. **Sandboxing.** We always like to roll out a sandbox group in the design stage for numerous reasons.From a training perspective, it leaves you with a group of more experienced users on go-live day, which always makes end-user training easier.
3. **Dynamic instructor.** A dynamic instructor with a legal background goes a long way with lawyers. If you use someone boring without knowledge about what lawyers do, you will lose your audience. Losing your audience is the last thing you want when end-users must learn critical features of software.
4. **Go slow and summarize steps several times.** Summarizing steps at the end of each lesson and going slow will insure meaningful comprehension. Going too fast and failing to summarize insures an extremely frustrating experience.
5. **Onsite is best.** Web-based training is ok, and there are some amazing web-based instructors, but onsite instruction is the best option if it is in the budget. It enables trainers to build a relationship with end-users and be there to smile and hold their hand.
6. **Do two to three smaller sessions, spread out as opposed to one big session.** People digest information in smaller chunks. Think about doing several 1-2 hour sessions that are spread out over a week or two.
7. **Assignments to end-users.** At the end of each instructional session, give the end-users short assignments. For instance, instruct them to (a) save a document, (b) find the saved document (c) save an email, (d) find the email, etc.
8. **Immediate floor support after training.** Help users with their assignments and help them customize NetDocs. Ask them about their most important features & functions to insure success.
9. **Q&A session.** A few days after the initial training, do a session of Q&A with all the users. Record it for those who cannot attend.
10. **Smother users with quick responses and niceness.** Your smile is your logo. Your personality, professionalism and patience is your company's corporate brochure, and how you leave them feeling after spending time with you becomes your trademark!

End-User Training

KEYS TO SUCCESS AND COMMON MISTAKES

Joe Buser

Director of Business Development

Traveling Coaches, Inc.

"The data migration went smoothly. Application integrations were successfully tested and retested. All known technical issues were resolved. So what's the problem?" thought law firm CIO John on the day his firm rolled out a new DMS.

"The grumbling started when news leaked out," said Susan, LAA for the managing partner. "Our documents are saved in the cloud, not in our office. What happens when we can't connect or a lawyer loses something?"

"Partners see billable time wasted while we learn a new way to lose documents," chortled Kevin, a litigator. "I seldom use the document management system except for archive."

This scenario plays out over and over when firms underestimate the importance of **change management** to the success of their projects. They invest in the technical aspects of their projects but forget the **human element** is essential for user adoption. According to industry experts, 95% of projects with excellent change management met their objectives, compared to 17% when change management was poor.

Consider an alternative scenario...

"We were blown away when we saw how much NetDocuments improved our processes," said Susan, the LAA. "I didn't realize the cloud was more secure, always available, and more intuitive than our old system."

"NetDocuments is adaptable to the way I work."" said Julie, the DC associate. "I don't know how I got anything done with the old system."

"I can access documents from the airport, the hotel and the courtroom as easily as from the office. My laptop, iPad and mobile phone all work the same. I wonder why it took us so long to change?" exclaimed Kevin, the litigator.

"The managing partner took me aside and said 'You finally did something for us rather than to us.' It just doesn't get better than that!" beamed John.

Notice the dramatic difference in attitude and participation in this scenario. The essential ingredient of their adoption is clear, consistent, and compelling stories that inform, motivate and engage people to get their buy-in. Their adoption resulted in rapid return on investment, reduced support cost, and improved user satisfaction with the technology, with the IT department and with firm leadership. Everyone wins when change management is an integral part of the project.

Technology alone will never determine your success. Success is measured by how well people leverage technology to deliver on the promise of improved productivity, efficiency, security and customer service. Effective communications to build awareness and desire BEFORE rollout training is the secret sauce of success. Without it, you allow fear, uncertainty and doubt about a major change to impact the attitude of your users and the success of your project

We hope you've enjoyed learning from these industry experts and Certified NetDocuments Partners.

Whether you're preparing to switch your DMS or engage in another technology initiative, we hope you'll approach the change management project with help from those who have the expertise, history, and resources to make your project a success.

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