

“Our clients have instant access to those documents [on client portals] without having to make requests of us. That means we deliver better client service, and it’s a competitive advantage.”

– Mark Manoukian, IT Director

CHALLENGE

Better document management was a pressing technology need. “Our people, like most attorneys, spend more time on documents than they do on just about anything else,” explained Kegler Brown IT Director Mark Manoukian.

The firm implemented PC DOCS software (later known as DOCS Open[®] by Hummingbird) in 1994, but by 2006 the firm’s needs had evolved. The incumbent DMS no longer provided adequate search functionality, remote access or content storage ability. “Search capability is critical because we have so many forms and historical documents that we use and rely upon,” said Kegler Brown Director Paul Hess. “But with the incumbent DMS, running a full-text search could take what seemed like an eternity and, as you added more search criteria, the whole search could break down and you wouldn’t get any results.”

Attorneys also were not satisfied with the firm’s remote access tool, and they often bypassed it entirely by e-mailing documents to themselves. Accommodating file types other than those of Microsoft[®] Office was cumbersome. Employees typically saved non-Office documents haphazardly to folders on the office network. Functionality that did not exist in the incumbent DMS included:

- Matter centricity with customizable matter-specific Web interfaces
- Client portals
- E-mail filing
- Niche needs: matter-level security/ethical walls, scan routing, etc.
- Business continuity: co-location and high availability
- Integration with other systems: APIs and alternate interfaces.

Kegler Brown wanted to upgrade without making substantial investments in hardware, services, staffing, product upgrades and third-party products. Various competitors offered only some of the needed improvements and traded away at least one of the qualities that Kegler Brown valued in the incumbent system.

SOLUTION

Manoukian and Hess were at the 2006 conference for the International Legal Technology Association (ILTA) when they saw a demonstration of NetDocuments. “Paul watched the demo, and I watched Paul,” recalls Manoukian. “And I knew we had our document management solution.” Paul stated, “As I watched the demo of NetDocuments, I thought



Customer Profile:

Founded in 1964, Kegler, Brown, Hill & Ritter, Columbus, Ohio, with 65 attorneys and a total staff of 130, builds its legal services on the principles of caring, trust and honesty. The firm offers a diverse set of legal services at all levels—local, state, national and international. A brief history of Kegler Brown’s leadership includes notable officeholders, among them two former Ohio attorneys general.

Business Situation:

The firm’s former document management solution made it difficult, if not impossible, to find the documents attorneys and staff needed to service their clients.

NetDocuments Benefits:

- Fast, accurate searches make it easy to locate documents.
- Firm projects saving \$300,000 to \$400,000 over three years.
- Disaster recovery is enabled at no extra cost.
- Firm reports increased client satisfaction and an added competitive advantage.

www.keglerbrown.com

that it was the most intuitive document management solution that I had seen. I understood it immediately. I was not looking forward to switching to another document management system because I didn't want to have to spend the time in training to learn a new system. But when I saw NetDocuments, I could see that I could be productive right away."

Kegler Brown decided to adopt the NetDocuments solution, which eliminated the need for the firm to deploy and manage its own software and hardware. "Under the SaaS model, the back end—the file, indexing, web servers, et. al.—is already in place and waiting," said Manoukian. "All you need is a user name and password and, within 30 minutes, you're creating, saving and retrieving documents."

For the document migration process, LexisNexis configured a daily synchronization mechanism that gave staff full access to their documents in either system over the course of the implementation. "The migration process to NetDocuments was amazingly smooth," Manoukian said. The pace was dictated by the firm's strategy: The most demanding employees would go first, both to serve as a litmus test and to give the information technology staff a little time to iron out issues before a mass roll out. Over an eight-week period, the initial pilot group of eight attorneys and a handful of support staff grew to include the 20 percent of firm employees who constituted DMS power users. Then the remaining 80 percent of employees were trained and migrated within the span of two weeks.

RESULTS

Reliability - Search reliability has vastly improved. "With NetDocuments, the searching is faster and the accuracy is exactly what we want," said Hess. "I don't have to perform multiple searches to find a document, and I don't have to waste my time or my secretary's time trying to find a paper original. Once the document has been entered into NetDocuments, I can always find it, and more importantly I can find it quickly."


Search functionality improved again in 2008, when NetDocuments implemented the state-of-the-art FAST search engine (acquired by Microsoft for \$1.2 billion). Kegler Brown employees enjoy the FAST set of semantic and linguistic indexing capabilities—not as a third-party add-on, but as an embedded, out-of-the box NetDocuments feature.

Remote Access

Remote access usage increased sharply. NetDocuments is a Web-delivered application; Kegler Brown professionals access it via Microsoft Internet Explorer. "I'm more productive because I can access the documents I need wherever I am," said Hess. "I can work on documents at home in the evening or while traveling, allowing me to respond to the needs of my clients so much faster than if I had to wait to return to the office."

File Type Flexibility

With NetDocuments, firm professionals can import a broader range of file types, including JPGs, PDFs and executables. Said Manoukian, "Executables are particularly important for us since RealLegal® transcripts are sometimes delivered as executables. We used to store a lot of documents outside of our document management system because it wouldn't support them. Now, we don't have to do that."



"... I didn't want to have to spend the time in training to learn a new system. But when I saw NetDocuments, I could see that I could be productive right away."

Paul Hess, Director
Kegler, Brown, Hill & Ritter

Matter-centricity

The NetDocuments workspaces feature provides matter-centricity. Both billable client matters and non-billable administrative matters can have their own highly customizable home pages. Employees can create sub-containers and inner files and populate them with saved searches or content they place in sub-folders. Some practice areas also create home pages keyed on the non-billable matter number. Employees place annotated, high-value model documents and legal research in these workspaces. In this way NetDocuments provides knowledge transfer.

Client- and Matter-Specific Portals

Kegler Brown now provides clients with client-specific and matter-specific portals. "It is extremely easy to set up a portal because it's a feature built right into NetDocuments," said Manoukian. "And it eliminates the time that otherwise goes into distributing copies of materials to clients. Our clients have instant access to those documents without having to make requests of us. That means we deliver better client service, and it's a competitive advantage."

E-mail Filing

E-mails filed in NetDocuments are also available natively in Microsoft Outlook®. Over time, attachments and then e-mail messages themselves are pruned from the Outlook side according to a schedule set by Kegler Brown staff.

Other Niche Needs

Kegler Brown uses NetDocuments security options to apply ethical walls. Routing of scan jobs into the DMS became much easier with NetDocuments, obviating the need for a third-party solution. The Kegler Brown IT staff found that NetDocuments integrates well with other systems. They wrote their own executable with the readily available NetDocuments SOAP APIs to upload matter index updates from their accounting system and author index updates from InterAction® customer relationship management software. In addition, the firm uses WebDAV to load content into NetDocuments.

Business Continuity

Based on Kegler Brown's specific needs, electronic documents are stored in multiple LexisNexis co-locations designed for high security.

Return on Investment

According to Manoukian, the NetDocuments deployment costs, which were driven almost exclusively by document migration, were tens of thousands of dollars less than the projected costs of rolling out a comparable in-house solution. Proposed costs for a like in-house system included capital expenses for storage area networks (SANs) starting at \$75k, plus third-party software to improve scan routing, e-mail filing, client access, ethical walling and/or other functionality. Kegler Brown also would have needed to add another technician to its three person IT staff.

Compared to implementing an in-house equivalent, going with NetDocuments cut three to six months off the timeline and brought Kegler Brown a projected bottom-line three-year savings of \$300k – \$400k.

About NetDocuments

NetDocuments allows you the freedom to access and work on your documents anywhere. Get to the Internet and login to all your documents. Create, edit, share and collaborate with others. Organize into folders based on clients or projects. Search the content of your Word, Excel, PowerPoint, PDF's, and emails.

Have the peace of mind knowing your work is backed up and secured in world-class data centers. Small to large businesses, law firms, financial service firms, health care and real estate organizations can save tens of thousands of dollars by eliminating the hardware, system and client software, and ongoing administration of on-premise systems.

For more information about NetDocuments, please call 1.866.638.3627 or visit our web site at www.netdocuments.com.

