



FINALLY SOLVING DOCUMENT MANAGEMENT: NEXT GENERATION SOLUTION AUTOMATES A VEXING PROBLEM

Attorneys are constantly being challenged to be more productive, yet firms are bombarded with documents needing scanning, categorizing, sorting and filing for preservation and (hopefully) easy retrieval when needed.

Whereas documents may be the lifeblood of the practice, document management continues to vex attorneys and staff alike. In 2015 *less than half* of all firms with under a hundred attorneys have any type of formal document management system in place.

How can firms get off this document treadmill and reduce—or eliminate—the need for traditional document management?

This white paper looks at ways firms can take the learnings of search giants such as Google and Bing to deploy a document management and retrieval system that eliminates most of the difficulties of systems past.

Digital Deluge: The Problem

Attorneys are drowning under a data deluge. Matters and files increasingly incorporate email, scanned documents and PDFs resulting in an ever-increasing onslaught of information that needs to be categorized, tabulated and filed for retrieval when attorneys or staff need to review or utilize it. And thanks to the digital revolution, there are a growing number of documents that never even see ink put to page but rather are created, revised, signed and agreed to electronically. The result is a mashup of electronic and paper scanned images, documents and emails with client and matter information residing in multiple locations and multiple formats. This abundance leads to two problems. First, attorneys and staff need to have all this information at their fingertips, and second, for it to be of real use, the firm needs a way to collectively preserve and then easily retrieve all of their documents and other digital content from every source.

Over the past few decades firms have largely attempted to solve this problem in two ways. Some have relied on simple PC and networked storage, while others have employed dedicated document management systems (DMS) to help untangle this complicated mess. However, most existing document management systems were created in the 80s and 90s, before email, smart phones and tablets and do not account for how lawyers work today. In many of these early DMSs, there is often no provision for—or ability to integrate—mobile devices or email into the document workflow. Additionally, these systems often fail for two major reasons. First, they assume that electronic documents need to be moved like paper to a central location and manually organized with rigid uniform rules in order to find them later. Second, they assume that lawyers do all their work from a single PC and store all their documents on one device.

In today's highly mobile, rapidly evolving, and distributed world, neither of these assumptions is still valid. Attorneys and staff use email extensively to interact with colleagues and clients and may employ PC, smartphone and tablet in the same day to work on the same matter, storing documents on their computers, on corporate networks and even in cloud storage systems. Building one rigid, universal filing structure is not only a huge undertaking for most firms, it is no longer effective. In fact, the result is that the typical traditional DMS often captures less than half of a firm's information.

For many other firms, there is a different challenge. Less than half of all firms with fewer than a hundred attorneys have any type of dedicated document management system in place at all, instead relying on a manual taxonomy and catch-as-catch-can recordkeeping. So it should be no surprise that lost files or documents is one of the top five most commonly alleged errors in professional liability claims.¹

Document Hide and Seek

Regardless of a firm's approach, the result is a hodgepodge of data collection and search practices that at best leave a lot to be desired, and at worst leave the firm open to risks of never finding key documents and being unable to leverage a valuable asset to the benefit of every attorney and matter.

Collecting emails, documents and briefs, categorizing them and filing them are the major—and evolving—challenge. To be truly effective, a DMS must include 100% of the firm's emails and documents, and more importantly must not rely on voluntary or even forced compliance by an already overworked staff for clerical tasks such as uploading, categorizing and tagging.

Then there is retrieval. Even the best organization and taxonomy means nothing if accessing documents is a cumbersome process to begin with. A successful DMS must be able to take advantage of the latest technology tools to allow users to *find* documents based on simple web-like searches rather than requiring arbitrary fields and file names to be laboriously entered.

Most importantly, the system must not impose changes on the way attorneys and staff work, but instead should accommodate existing workflows seamlessly with no changes required.

Lack of an efficient DMS can make locating critical documents even more difficult. When attorneys find a system unworkable they often create their own alternative systems, keeping important documents and emails in filing systems on their PCs, in Outlook folders, on personal hard drives or shipped off to the cloud with services like Dropbox or OneDrive. The result is that firms lose important knowledge and data because it is no longer accessible. Additionally, they put themselves at risk of permanently losing information if a PC is stolen or accidentally damaged.

The Latest Technology: MetaJure

Today, however, firms can take advantage of the next generation of DMS. One such example is MetaJure, which takes an entirely new approach to an age-old problem.

Designed by lawyers as a solution for legal system end users and not for IT experts or back office specialists, MetaJure leverages automation to deliver a powerful and immediate impact on the way firms think about document management. More importantly, it makes the work involved in managing emails and documents effectively disappear, automating collection and making retrieval as easy as a web search.

¹ Ewins & Vail, "Profile of Legal Malpractice Claims: 2008-2011"

When you're seeking a document management solution, here are some things you should look for.

1 COLLECTION: Since documents and emails can reside virtually anywhere from local PC to ethereal cloud storage, look for a solution that reaches out and finds all work product rather than assumes that information will find its way into the DMS. Products like MetaJure automatically 'see' and collect 100% of the firm's information—every email and stored document—that is associated with a lawyer's PC, Mac, smartphone or tablet, regardless of where it was located or what application was used to create it. Attorneys should not need to lift a finger; their DMS should do this all invisibly in the background.

2 INDEXING: Here is where using 21st century computer power makes all the difference. Rather than having attorneys or staff spend hours classifying and tagging every document and email, the selected DMS should automatically scan each collected document, indexing the documents plus metadata indicating other information such as original storage device, user name, and directory or email folder of the original document. And even if the document is a "flat" scanned image, the DMS offering should utilize its built-in optical character recognition (OCR) feature to extract the actual text, attach it to the document as metadata, and index on that as well, greatly increasing the ability to find and make use of even images when needed.

3 RETRIEVAL is as critical as capture, and so firms should insist their DMS utilize another 21st century approach by creating a Google- or Bing-like search interface that completely simplifies the retrieval and access of documents and emails no matter where—or by whom—they were created. Attorneys need only type in their search query as if they were searching the web, and a list of matching documents and emails should be returned along with information on where it came from—such as creating the user's directory or email folder, file server or cloud storage location. They should also be able to use filters, or for more complex queries the same logic you would when constructing a web search including Boolean operators and quoted text. If an attorney can use Google, they should be able to retrieve all the relevant documents they need in a snap.

Automation vs Manual Exertion

What does a firm gain by utilizing a new approach to document management? A lack of headaches and lawyer complaints, to begin with, as well as the confidence of knowing that information is safely stored and easily retrievable. Attorneys and staff can say goodbye to the lost hours and days spent agreeing to taxonomies and categorizing every document. For some firms this can be an unsettling thought, since "it's always been done that way." Look no further than the web itself to see how this paradigm change came to be.

In the early days of the web, organizations had to tag their websites and those searching the web believed that the internet needed a taxonomy and structure to enable effective searching. However, the reality has been entirely different. Just as web crawlers collect, index and extract information on websites and what's contained within them, MetaJure does the same for the firm's universe of documents and emails with a similar result—simplified retrieval and access and the elimination of tagging and taxonomy worries.

Another pain point relieved is the question of what percentage of documents are actually captured and indexed for easy access. Suddenly gaining access to 100 percent of relevant emails and documents—where perhaps only 50 percent were previously accessible—can make the difference between the successful conclusion of a matter, avoiding a malpractice lawsuit or enabling new proactive approaches thanks to the immediate access to all pertinent information.

How to Train your Attorneys

Firms that already have an older DMS in place may be concerned about the retraining required to deploy a new platform. Of course, the best training is no training at all, and that's exactly what these new systems enable. Since the software agent does all the collection and indexing work, all attorneys need do is what they normally do every day. Emails, documents and PDFs both sent and received are captured and indexed with no additional work on their part, whether that information was created in the office, the courtroom or on the road. In today's highly mobile legal workplace, it is critical that a DMS interacts with all the devices and storage that attorneys and staff interact with, and does so quickly and completely behind the scenes without impacting attorney performance in any way.

For those firms that don't yet have a DMS in place, congratulations. Although procrastination is not often a good approach, this may be one instance where NOT having adopted a first-generation tool can pay off in spades. Law firms are not typically known as early adopters of new technology for many reasons, including a lack of IT resources in many firms that makes it difficult or impossible to evaluate the variety of DMS offerings that have evolved over the past few decades. Additionally, the first few versions of new technology offerings are often bug-ridden and problematic. Windows 1, anyone?

Occasionally there comes an opportunity to leapfrog to next-generation technologies that avoid the problems inherent in early innovations. For example, many developing nations have largely bypassed the stringing of landline telephone lines and leapfrogged to a mostly (or all) cellular wireless telephone network, skipping the need to string thousands of miles of cables and fell untold numbers of trees to serve as utility poles.

This is a chance for those firms without a DMS to learn from the experience of firms that have a first-generation one in place. Even though almost half of all firms have tried a DMS, customer satisfaction with existing offerings has been quite low, largely in part due to the need for manual uploading and tagging, which often overlooks email and attachments entirely. Lawyers who have used first-generation DMS products complain about difficulty learning to use them, about inflexibility, and about how incomplete the results often are.

Whether your firm has waited or not, the time to move to next-generation DMS is now. The benefits are clear and immediate.

The Next Generation of Document Management is Here

All of these benefits, from automatic collection and indexing of documents, email and attachments to simplified search-engine like retrieval are embodied by MetaJure, the latest in DMS technology.

Unlike other DMSs, MetaJure requires no expensive data conversions, phased roll outs, or changes to your existing information system assets. MetaJure completes your information systems instead of trying to change them.

MetaJure creates a single, secure place behind your firewall where all your firm's documents can be easily and quickly shared by any attorney in your firm. Its fully automated and intelligent DMS eliminates the need for lawyers to be

their own document and file clerks, uses state-of-the-art algorithms to speed finding of emails and documents, and gives safe and secure access to 100 percent of the documents and emails that matter.

Founded by a team of lawyers who had struggled with document management for years, MetaJure has succeeded in eliminating the drudgery of maintaining a DMS while enabling the firm to ensure that attorneys and staff have virtually instant access to the information they need to get the job done.

The best part? Attorneys and staff don't have to lift a finger to make it happen—collection and indexing that takes advantage of your existing metadata (directory structure, email folders) is instant and automatic. And searching for important records and documents is as easy as searching the web.

To find out how your firm can start taking advantage of 21st century automation tools, contact MetaJure at www.metajure.com/contact-us or 206-812-8750.

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