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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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End-User Training

KEYS TO SUCCESS AND COMMON MISTAKES



Doug Striker

CEO
Savvy Training

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 is limited, 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.



More than just smart



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