

15 QUESTIONS ORGANIZATIONS SHOULD ASK WHEN EVALUATING A DMS



Organizations of all sizes are continually evaluating new processes and technologies to remain competitive and provide the best service to their clients.

As they increase client load and scale their practice, an important area of focus is document management – enabling users to save, search, and work effectively with the documents, emails, and messages that flow through the firm every day.

While a DMS should be as agile and adaptable as the organization it serves, the key focus should be on finding a quality vendor. And key stakeholders must understand the benefits of investing in a legal DMS solution over a general enterprise offering.

Specifically designed and developed to meet the needs of legal professionals, organizations can be sure their data is managed in the way they need, helping them become more agile and productive.

But where do firms start in determining if a DMS has the functionality, people and processes required to support their firm's needs?

HERE ARE 15 QUESTIONS ORGANIZATIONS SHOULD ASK WHEN EVALUATING DMS VENDORS:

- 1. How can your DMS help make my organization be more organized and productive?** A DMS vendor should understand your organization's organizational needs. Its solution should offer flexible suggested filing locations and document history for documents as well as emails. It should provide intuitive version control to enable collaboration across your organization and with external stakeholders. And it should display timelines and dashboards to improve productivity across your department.
- 2. How does your DMS differ from enterprise solutions in overcoming documentation issues specific to my needs?** The capabilities of the vendor's solution should reflect the workflow, collaboration, and security requirements that your organization requires. A DMS also differs from other enterprise tools in its ability to organize information based on how its users need to work, with metadata and security inheritance so that information can be tagged appropriately based on the type of document or email.
- 3. Can your solution help me manage all my emails as well as my documents?** A modern DMS must enable organizations to manage their emails as effectively as their documents in the same folder structures. By having a single repository for all communications and documents relating to a matter, you can be better prepared for compliance with industry and government regulations.
- 4. How does your DMS help improve my ability to search documents? Can I search the full text of the document?** An IDC study found that knowledge workers spend about 2.5 hours per day, or roughly 30% of the workday, searching for the right information. Modern document management includes more powerful search capabilities that saves valuable time, helps leverage precedent more effectively, and makes more efficient use of information resources. Leading solutions integrate with common applications firms use to create documents, including Microsoft Office®, SharePoint®,

Gmail®, Adobe®, and Apple iWork®. Also, when dealing with executed contracts, PDFs, and paper documents that are not full-text searchable, some DMS providers offer the capability to effectively process this information, which can save you countless hours of manual searching.

5. Can your DMS help me manage my paper documents too?

Regulations often require physical documents to remain stored as paper records for varying amounts of time depending on the region or type of document. A modern DMS includes capabilities that allow your organization to manage both paper and electronic records centrally from a single solution, enabling enforcement of compliance and governance policies, including trigger events, retention periods, and disposition rules.

6. Our organization has a legacy DMS but it's clunky and no one uses it. How easy/intuitive is your solution to use?

The most successful deployments include user adoption as a vital metric. The DMS needs to deliver an intuitive and easy-to-use experience, modeled after the consumer tools that professionals use every day. Ideally the solution will require minimal training and provide embedded learning tools to optimize performance. Some DMS providers will even help convert your organization's information from legacy systems and import it into the new DMS. They should utilize a mature partner network that can help with this.

7. Are all documents in the system accessible on a mobile device? If I lose my internet connection, do I lose access to saving, searching, and accessing documents?

You often need to access organizational documents on the go, which means you expect a seamless experience with your DMS from your office desktop to your mobile devices no matter where you are working. Modern document management enables users to work from anywhere on any device, with a consistent interface, so professionals can be more agile and responsive to business demands. Some DMS platforms even allow for working offline and syncing changes when the device connects to the internet again.

8. Can your DMS be integrated with our organization's current technologies?

In every organization, there are typically several different technologies being leveraged. The DMS should integrate seamlessly in this environment, and your technology partner should be able to demonstrate which integrations are available out of the box. And they should also have

the technical expertise and experience to implement these solutions through their partner network.

9. How secure will my documents be? With increasing threats and breaches across all industries, you need the highest levels of security protections for your proprietary work product, but the security threat landscape is continuously changing. Your DMS needs to deliver a multi-layered approach to security, that's both comprehensive and unobtrusive to the end user. Documents and emails should be automatically encrypted, with need-to-know access set at the document and matter level, as well as behavioral analytics to monitor and flag abnormal user activity. Security protections should also include support for defined regulatory policies, like GDPR and CCPA, while being fully tracked and auditable.

10. Our organization wants to implement your DMS in the cloud but IT is concerned about stability and security. What's your DMS cloud Strategy? Modern document management must have a cloud storage capability to enhance organizational agility with rapid deployment, guaranteed reliability, and uptime. To determine superior performance, cloud comparison tests can and should be requested between final DMS contenders. And most importantly, your cloud DMS vendor needs to deliver a multi-layered approach to security starting with Zero Trust, built on trusted cloud standards and certifications (most importantly ISO 27001 series and SOC 2 Type 2), as well as offer customer-managed encryption key control. Zero trust is built into some Cloud infrastructures from day one. If it is bolted on after the fact, it can introduce additional complexity and risk.

11. What's your strategy for transitioning/onboarding? What kind of support do you offer? Use of enterprise systems varies across organizations. When implementing a DMS, vendors must offer comprehensive support during this transition time, including project management, risk assessment, data migration, recommended design, and additional assistance to ensure change management, user enablement, and user adoption.

12. Will my IT department or IT vendor have an additional burden because of this solution? Whether your IT department is in-house or you leverage an IT vendor, the modern approach to document management incorporates cloud service delivery, which actually decrease your IT burden. It enhances organizational agility with rapid deployment, automated updates, and the

ability to quickly add new functionality, while your IT resources stay focused on the business. And during implementation, IT should only have minimal involvement with setting up desktops.

13. Who is using your solution today and what do they say about it? Any corporate technology vendor should be able to provide customer references for each of the different industry segments in which they serve. Also, you should do research on legal technology user forums and review sites to ensure you are choosing a vendor that has a strong technological offering and has solved similar

business problems to the ones your organization is facing.

14. What is the cost of the software? Pricing for legal document management systems usually involves a one-time onboarding fee and then a per-user monthly subscription. Lawyers, as well as admin users, will need licenses to be able to access the full capabilities of the DMS. Ensure that you fully understand all aspects of the pricing quoted to you so you are not surprised by any unexpected costs after implementation. And ask about pricing for any add-on services offered that your team might need.

15. Can you tell me why I should choose your DMS over your competitors? In the crowded technology marketplace, it's important to carefully evaluate any potential partner's business viability, customer base, and points of differentiation from competitors. Look for vendors that can provide strong customer references with similar use cases in other firms. Conduct research on technology user forums and review sites to gauge end users' opinions of their offering. Look for a provider that demonstrates a commitment to partner with you through implementation and beyond to ensure you meet your business goals. And, the DMS vendor should offer a platform solution that provides additional capabilities that your team might need in the future like additional security or artificial intelligence. They should have a reputation for being a leader in the industry for innovation and enhancing solutions. Also, as your organization grows and scales, onboarding new users to the new DMS is often the biggest challenge, so you should ask vendors about how they help in-house teams achieve optimal adoption across the department.



iManage and in particular iManage in the cloud, (Work 10) provides a secure and technologically advanced platform for you to manage all of your document assets. The regular updates on the cloud platform are completed with little or no downtime to the end user, and we are served up new intuitive interfaces with which your users can quickly adopt and get back to the real work at hand.

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iManage transforms how professionals get work done by combining artificial intelligence, security, and risk mitigation with market-leading document and email management. iManage automates routine cognitive tasks, provides powerful insights and streamlines how professionals work, while maintaining the highest level of security and governance over critical client and corporate data. Over one million professionals at over 3,000 organizations in over 65 countries – including more than 2,000 law firms and 500 corporate legal departments – rely on iManage to deliver great client work – securely.