

Professional Perspective

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# Considerations for Legal Organizations Moving to the Cloud

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The reasons why any law firm decides to move to the cloud are myriad, but they are always unique to the firm itself, reflecting the firm's particular needs, goals, technological maturity, and digital transformation.

For some, 2020 and 2021 saw additional, pandemic-spurred impetus to move law firm content, email, and applications to the cloud. Those that make the move are quickly able to realize the inherent scalability, accessibility, governance, security, and cost-savings benefits that come from leveraging the latest technology innovations in a software-as-a-service (SaaS) environment.

Reflecting on the journey that Shearman Sterling took in moving to the cloud tells one firm's individual story—but it also helps reveal some key considerations that any legal organization should keep in mind to ensure success when moving to the cloud.

## Focus on Business Outcomes

“Moving to the cloud” shouldn't be considered a goal or purpose in and of itself—it should be considered a means toward achieving specific goals or outcomes for the firm.

In the case of Shearman Sterling, a large, multinational, New York-headquartered firm with a distinguished 150-year history, there were a couple goals top of mind. Compliance and governance led the way: The firm needed a way to effectively govern work content that was being stored across a variety of libraries and file share systems to future-proof the organization against shifting and fast-evolving client and regulatory demands.

At the same time, a premium was put on modernizing the end user experience for its professionals. Whatever solution the firm chose needed to make it easy for users to access documents, emails, and other files “anytime, anywhere, on any device,” and to offer a high degree of user friendliness.

In sum, business goals like information governance—the ability of the firm to govern its data effectively in a modern regulatory environment—as well as a desire to empower its lawyers to work the way they want to work ultimately drove the process.

On the cloud side, addressing these goals requires leveraging a comprehensive platform vision: Law firms need to partner with a provider that not only understands compliance and how to help firms work securely, but also understands the importance of user experience and enabling firms to work productively. It's not enough to offer a piecemeal solution, providing one but not the other.

Better governance leads to better organization of content and communications. And that organization of data enables not only the application of rules and policies for retention, security, and the like, but also becomes the foundation for making better data-driven decisions, improving client service, and enhancing user experience. It's important that the technology ease knowledge professionals' lives, rather than force them to work in a way foreign to their natural workflow.

Cloud adoption can also contribute to a firm's focus on the practice of law. IT time previously allocated to managing servers, maintenance, and applications can be refocused on higher level tasks—more quality driven tasks that support the strategic objectives of the business.

## Start With a Conversation

When law firms consider moving to the cloud, some still have an initial, gut reaction that, “Well, our clients will never let us do that.” Often this reaction is based more on assumptions than reality.

The move to the cloud should be a conversation, not a prohibition. As a first step, law firms should figure out whether they have any prohibitions, either from a regulatory perspective or a client audit perspective.

Shearman Sterling undertook an analysis of nearly 7,000 general counsel guidelines before moving to the cloud. The firm reached out to not only those clients they were required to notify of the movement to the cloud, but also to many they

weren't specifically required to notify. This courtesy discussion served as an invitation to have a conversation around the move and share insight on its benefits.

What soon became clear is that there was no prohibition against moving to the cloud, but that clients benefited from a conversation to make certain that the firm was doing it in the most secure way, with the best data governance and data protection available.

At that same time, the firm brought in its outside auditors to assess its process around best practices for managing its data and content in the cloud. Between the adoption of different data classification models and the ability to store content in three separate regional libraries, the firm was able to reassure clients that everything would be fully in order from a compliance perspective.

Achieving this end, of course, requires a modern, flexible SaaS solution delivered through the cloud that is capable of easily creating new instances of the service in any geographic location that the customer requires.

Without that flexibility—and the ability to ensure that data lives and breathes in the region in which the transaction arises—the promise of tackling any current and future compliance needs in a frictionless manner falls flat.

Likewise, the ability to provide a spectrum of security—from advanced threat detection to ethical walls and security policies—is a need-to-have, not a nice-to-have for any cloud offering. A firm's clients need to know that their data is going to be just as protected—or even better protected—in the cloud than if it were sitting behind the firm's firewall.

## Find Partners Who Can Help

Shearman Sterling went live in the iManage Cloud in June 2020, rolling out the service across 23 international offices to 2,200 legal professionals.

The successful rollout was not the result of waving a magic wand or pushing the “easy button.” Shearman Sterling made sure to approach its move to the cloud from a people, process, and technology perspective to ensure success.

As part of its engagement plan, Shearman Sterling conducted over 2,000 sponsor conversations, trainings, and other forms of outreach to make sure that people understood why the firm was making the move to the cloud and why certain workflows would benefit by changing those processes.

An important lesson here is that the last 10% of any problem is the technology. Before bringing in the technology component, there needs to be significant work done on the front end to understand the people and processes for different practice areas, and to map those processes and data accordingly.

Additionally, to help ensure a successful rollout, Shearman Sterling created a “war team” of approximately 120 individuals, including key people from the firm, from the cloud provider, and from the systems integrator.

The war team was there to parse issues and field questions as the rollout proceeded. Additionally, there were biweekly governance meetings among the firm's chief technology officer, chief knowledge officer, and the CEOs of its technology partners to make certain that everyone was moving forward in the right direction.

This coordinated approach highlights the importance of having service providers who are committed to the success of their customers and who take delight in seeing real-world customers benefit from the solutions they develop.

## Maximum User Impact

In the case of Shearman Sterling moving all of its documents and email communications to the cloud, there were clear numbers to help measure the success of the project. Prior to the move, only 4% of its work product was saved in a single repository. With its move to the cloud, Shearman & Sterling went from more than 100 different repositories to one centralized repository. As part of that consolidation, it also culled down nearly a billion documents to 25 million, using its new data classification model and global records management policy to ensure it wasn't over-retaining data.

In addition to saving the firm's lawyers valuable time by serving as a single source of truth for documents, email, and communication, the SaaS solution provides the firm with secure, easily searchable access to critical documents and emails

anywhere, anytime, from any device. The unified environment paves the way for greater collaboration among legal professionals and provides the firm an exact understanding of who has access to which information at what time.

Since the firm went live on the cloud in the middle of the Covid-19 pandemic, this capability has proven to be hugely prescient and advantageous as remote working and hybrid working has become business as usual. It was also beneficial to have adopted a solution providing tight integration with the firm's cloud-based suite of office productivity applications for email, document creation, and messaging and team collaboration—especially as team collaboration tools have become increasingly indispensable to professionals working in highly distributed environments.

Just as importantly, having a single repository with three regional libraries has allowed the firm to achieve its business goal of assuring clients worldwide that their sensitive and privileged content is secured and governed at the highest levels, and in compliance with all applicable regulations.

## **Conclusion**

Ultimately, any law firm moving to the cloud needs to be clear on its goals for making the move, and then have a clear plan for moving forward. By partnering with the right cloud provider, any firm can start reaping the advantages that led them to seek out the cloud in the first place.