

Armstrong Legal Streamlines Case Management Processes with NetDocuments

THE CHALLENGE

The past decade has been a period of rapid expansion for Armstrong Legal with the firm growing on average by 20 per cent every 12 months. While this has been exciting for staff numbers which have increased markedly from 60 to just under 100 in just over three years, it has also created some pressures on underlying workflows and systems.

“We open more than 4000 matters each year,” says Harle McGeachie, General Manager Armstrong Legal. “Understandably this generates a lot of documents and efficiently processing and storing them is an ever-growing task.”

Until last year, the firm had relied on its Caseflow platform to both generate and store documents across all departments. “We had no document management system in place,” says McGeachie. “We had been using Caseflow as a document repository, but it did not have any search capabilities.

“If staff needed to find a particular document, they had to use either the client name or the matter number to find the right repository. Then, it was a matter of browsing through and clicking on multiple documents until they found the material that was required. It was far from ideal.”



With a team of more than 50 solicitors, Armstrong Legal provides a portfolio of services to clients throughout Australia's eastern seaboard. Founded in 2002, the firm specialises in providing legal advice and support in the areas of family, criminal, traffic, corporate crime and contested estate law matters.

The firm operates from offices in Brisbane, Sydney, Canberra and Melbourne with satellite offices in Adelaide and Perth.

McGeachie says about three years ago the firm's senior management realised that Armstrong Legal had outgrown the existing infrastructure and it was time to find an alternative. "But, at the same time, because we didn't have a document management system, we really didn't know what we didn't know."

THE SOLUTION

Armstrong Legal asked Caseflow for advice on what document management platform would provide the best integration with their software. Three options were recommended and, after a thorough examination was undertaken, the decision was made to deploy NetDocuments.

"For me it was all about the user interface and experience," says McGeachie. "On that front, NetDocuments clearly won hands down."

The decision to deploy was made in mid-2015, however the project was subsequently put on hold as the firm was undertaking an office move in Sydney. It was reignited in November, 2015 and the new platform went live across all offices in 2016.

McGeachie says the transition to the new management platform was painless. "People tended to pick it up fairly intuitively and didn't require a lot of training," he says. "NetDocuments worked with us throughout the process to ensure close integration with Caseflow and that there were no disruptions to our operations."

THE BENEFITS

With the new document management platform in place, staff quickly came to enjoy some significant benefits.

"The search capability that NetDocuments provides has certainly been the biggest benefit for us," says McGeachie. "It has made finding documents so much faster for staff which, in turn, frees them up to focus on other activities."

NetDocuments has also increased the consistency of documents being filed in a secure, central repository. Previously significant numbers of documents had tended to end up stored on local hard drives or even in the firm's Outlook email system. Now everything is housed within NetDocuments.

"Traditionally the firm has had a practice of scanning a complete file as a PDF at the completion of a matter," he says. "Previously we had to do this to be sure we had a digital copy of everything before the paper file was destroyed. Now, because we know everything is being stored in NetDocuments, we will have the opportunity to remove this time consuming process."

McGeachie says there are still quite a few capabilities within NetDocuments that are not being used by staff. For this reason, some follow-up 'tips and tricks' training is planned.

"In the future will be able to make better use of the software when it comes to sharing documents with clients," he says. "We can do this securely using links rather than emailing files as attachments."

"The platform is now running well and supporting staff across all our offices," says McGeachie.

"NetDocuments remains very proactive and, if any issues arise, they are attended to very quickly. They also keep us informed about what they have coming in their development pipeline."

McGeachie says he is confident the firm now has in place a document management platform that can support its growth for many years to come.

For more information, please visit www.netdocuments.com.

About NetDocuments

Founded in 1999, NetDocuments' cloud-based service allows firms of all sizes to reduce costs and increase security, mobility, compliance, and disaster recovery for documents and email from anywhere and on any device. With offices and datacenters in the US, Australia, and the UK, and with over 2,000+ customers and hundreds of thousands of users, NetDocuments is able to effectively service its global community spread across 140 countries. With anytime, anywhere access, firms are able to increase productivity and improve the client experience through a comprehensive cloud-based service.



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