PRIORITIZING SPEED, EFFICIENCY & REMOTE CAPABILITIES

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3545 Consulting®

Meeting Document Management Challenges with Innovative and Intuitive Technology

Pirkey Barber PLLC is one of the nation's largest firms devoted exclusively to trademark, copyright, and unfair competition law. The firm's 65-member staff, including 40 attorneys, is located in Austin, Texas and the Washington, D.C. area (Tysons), and practices throughout the United States and abroad. It is critical that all attorneys can work remotely, whether working from home, or when traveling for business, and the ability to quickly and easily file and access client documents.

The Challenge

Even pre-COVID, the ability for Pirkey Barber staff to work remotely was challenging. Attorneys attempting to work away from the office encountered server-access issues and used words like "slow," "heavy," and "sluggish," to express their frustrations. The Firm's goal was to implement three, new technology solutions that worked no matter where staff was located. They also emphasized that all data and client information be secure and protected from hacking, malware, and viruses.

Pirkey Barber's document management system, ProLaw, which the firm had been using since 2013, was failing. Attorneys had difficulties searching for and locating documents, resulting in a great deal of wasted time trying to retrieve critical document files. Since time is money for attorneys, spending up to 20 minutes to locate a document that they should have been able to find in five seconds was a significant time waster. Collaborating on documents was equally impossible, with multiple versions of the same document being created and an inability to ensure secure document downloads frequently occurring.

Addressing 2020 Technology Priorities and Goals

The firm's key technology objective for 2020 was to increase efficiency by acquiring technology that allows firm attorneys to work globally, with secure access to everything they need in the office. This includes mobile software that can easily handle three main functions: docketing, document management and filing, and timekeeping and billing.

Chawntal Louie, Pirkey Barber's IT Administrator, has worked with the Firm in several different positions over 13 years. She reached out to the legal community to determine what document management software solutions other law firms were using. Based on this research, she contacted several recommended software companies, vetted them, requested to speak to some of their customers, and sat in on several product demos.

After six months of evaluation, Chawntal narrowed the document management software choice to two: iManage and NetDocuments. She ultimately selected NetDocuments because of the company's many years of experience as a cloud-based solution provider, and because it met all the Firm's stringent security requirements. The NetDocuments experience has been overwhelmingly positive for them. Additionally, NetDocuments had many advanced features, including one that could quickly identify where attorneys file their emails for faster search and retrieval, which she found useful.

Finding the Right Partner to Assist with Implementation

NetDocuments works with several partners who are certified to help law firms with their software implementation. Pirkey Barber prefers to work with local businesses because they often offer an added "personal touch" clients appreciate when venturing into the world of new software.

Chawntal chose 3545 Consulting Global because, although they were in Houston, they often came to Austin. 3545 Consulting had the experience and expertise to assist Chawntal with the work that needed to be done before, during, and after the NetDocuments implementation.

Chawntal wanted to avoid overwhelming the Firm's attorneys with three major software technology changes at once, so she started with implementing the new docketing software. She had planned to implement the new time and billing system in October, followed by NetDocuments, but 3545 Consulting suggested implementing NetDocuments several months before time and billing. The reason? Document management software would be easier to learn, and the staff would need some time to adapt before taking the next step with a new, more complex time and billing application. After six- to eight-weeks preparation, Pirkey Barber went live with NetDocuments in July.

"I had several discussions with Nancy at 3545 Consulting. I interviewed her, and basically, I put her through the wringer, and she answered all of my concerns and questions immediately and with great confidence. I'm glad that 3545 Consulting gave us time to implement the new programs, get everyone trained, and let staff work with them. The transition worked out beautifully."

— Chawntal Louie

The 3545 Consulting Global Partner Relationship

After selecting NetDocuments as their document management software solution, Chawntal realized that there was still a lot of design implementation needed to support the NetDocuments application. At the time, the Firm didn't necessarily have a good strategy for document management and filing, and 3545 Consulting helped with that.

3545 Consulting assisted Pirkey Barber in creating their filing structure, making it less complicated and more intuitive. They demonstrated the NetDocuments workflow solution, including obtaining document approvals and working with collaboration tools.

Pirkey Barber's staff can now locate and collaborate on documents with everything right at their fingertips, even without an internet connection.

Looking Ahead with Confidence

At this point, some of Pirkey Barber's documents are still on the server, or personal laptops. All administrative files are in what NetDocuments calls "cabinets." Once the server is cleaned out, and all documents have been transferred, the Firm will have reached its goal. Chawntal will measure success based on how attorneys are feeling and a reduction in complaints and support tickets.

Chawntal appreciates the importance of the discovery process to the overall implementation process. 3545 Consulting was instrumental in setting up workflows, document cabinets, and filing systems through an integration they are handling with NetDocuments and SurePoint, the Firm's financial and practice management software.

"The training sessions were fantastic! Attorneys and the accounting group received training based on their individual needs. Everyone is using NetDocuments, and we are planning another training session in six months to address more advanced features of the software. Everyone in the Firm is happier, the mood is uplifted, and there is so much less stress. This has been a life-changing year for the Firm."   —   Chawntal   Louie

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