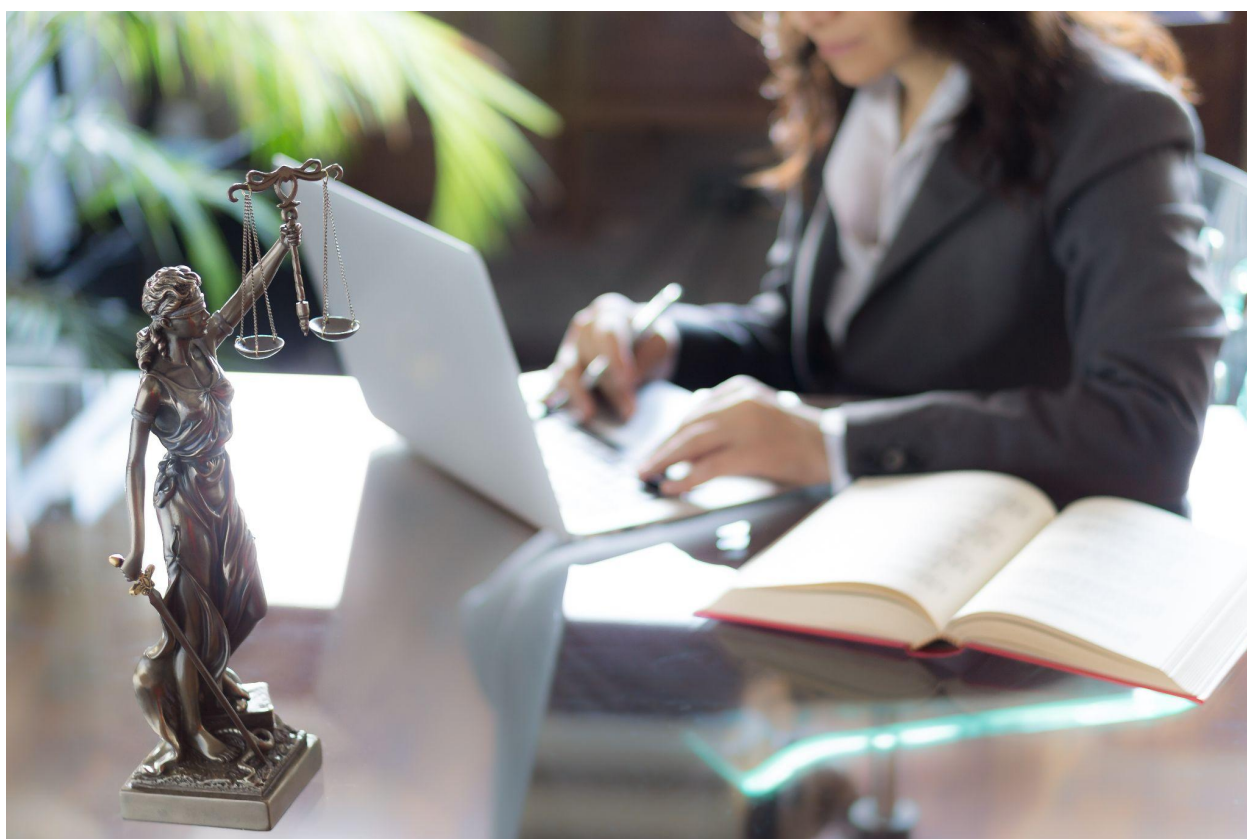




How a Document Management System Can Transform Your Law Firm

April 5, 2022



It is no surprise that law firms are flooded with paperwork and documents; it sometimes feels never-ending. We could go on for hours with contracts, bids, appeals, emails, briefs, etc. Law firms need to maintain their high quality of customer service and provide flexibility for staff to work whenever, wherever they are. It is almost impossible to keep all these documents organized, especially if they are all still paper-based and stored in filing cabinets. Most law firms today have thankfully made the transition to digital documents. Still, even with those, you can run into limitations with access and routing documents if you don't have a proper document management system (DMS).

Before we get into how a DMS can help your law firm, let's first talk about what a DMS is. A Document Management System (DMS) provides you with all of the software and hardware required to ensure that you maintain control over all your documents. A robust DMS allows you to manage, edit, and move documents from creation to completion. A complete DMS should also include document imaging, OCR, text retrieval, workflow, and more. These features can open up your firm to a completely digital and streamlined document management process that will increase productivity and help clients feel comfortable that the information they provide you is being appropriately managed. Throughout this blog, we will be diving into how these features can work for your law firm and how implementing a DMS can transform your law firm.

Organization and Access

The types of documents that funnel through a law firm are endless. You could have hundreds of documents, just for a single case. Trying to keep those organized while also easily accessible is difficult without

a DMS. Even [document storage solutions](#) like Dropbox can have limitations on how to organize your documents. When managing all these important documents, you need to have a system that works for your firm. Not all firms are the same, so you need a system that can adapt to your individual processes. With a DMS, you can centralize all your documents in one place. You can store both scanned images and files created on a computer—like spreadsheets, word processing documents, and graphics. Solutions like naming conventions can be great but can also lead to human error, and when dealing with documents like these, you want to ensure that they are stored and managed properly. A DMS gives you the features needed to organize your documents to make them easily accessible.

With all the different types of documents that run through a law firm, it can become challenging to find something quickly if your documents aren't searchable within your system. With a DMS, there are many robust ways to [index your documents](#), making it customizable to your business needs. For example, you may need a way to tag all your pleadings for a particular client. With a DMS, you can easily create an indexing scheme that includes the client name, dates, responsible attorney, document type, document purpose, or any other information commonly used by your firm to organize and manage client matters, allowing them to be quickly and easily found in seconds.

Workflows

The movement of documents can be hard to track when working in a law firm. For example, contracts can go through multiple stages, jumping from person to person. Without a way to streamline that flow, you can run into issues like lost or misplaced documents. Which then leads to people wasting valuable time tracking down those documents. A DMS can apply custom rules and logic to your document process flow and ensure that specific actions are taken or conditions are met before a document can proceed to the next step.

This allows you to automate these processes and gives you more time in your firm's workday.

Overall Collaboration

Law firms can spend hours doing revisions on certain documents. Depending on the length and the type of document, you may need approval and revisions from multiple partners within the firm. Usually, one would email them the documents or even walk them over to their office, but what if multiple partners need to review it? A DMS gives you the ability to have multiple people revise or review a document. Revisions are securely maintained on the central server, providing a robust audit trail of all edits and the author of each.

Security

Documents shared and distributed across a law firm can be highly confidential. Due to privacy restrictions, some of these documents may not even be shareable via email, especially since all law firms, depending on the practice, must stay compliant with regulatory rules on the federal, state, and international levels. You want to have the ability to give your clients the relief of knowing their information is safe. The best way to do that is with a DMS that provides you with more robust security. A DMS like Optix gives you the features for permissions-based documents where only people given the proper permissions can access it. You receive a full audit trail which can help with internal and external regulations.

Get Started Today!

Understanding why a DMS can transform your firm is just the first step in actually implementing a DMS. You can get started on research to see which system is suitable for your law firm. Here at Mindwrap, we

have industry-leading experts to help you get that conversation started and get your firm moving forward in the right direction. [Contact us](#) today to get started.