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## PRODUCTS



• NetDocuments  
• ndMail



• SetBuilder  
• CollabSpaces



• ndThread

# Reaching Big Picture Goals to Deliver Superior Client Service

## About Ellisons Solicitors

Established over 250 years ago, Ellisons Solicitors is a sizable mid-law firm with 250 employees and seven locations across Essex, Suffolk and London. But their impressive history doesn't mean the firm is stuck in the past. Ellisons is an innovative firm built on a strong tradition of highly personalised client service that meets and exceeds rising expectations.

As a progressive firm that's fiercely committed to delivering excellent client service, Ellisons Solicitors had already done most of the hard work of digital transformation. There was just one piece missing: their document management system (DMS).

"We had several systems, including Partner for Windows (P4W), that had moved to the cloud. But we couldn't overcome the issue of having to come into an office to access physical files," says John Turner, Ellisons' Chief Operating Officer (COO).

Instead, the team was working with a mélange of document storage solutions — networked shared drives, email inboxes, paper files and more.

"The thing that was missing was the ability to work remotely," he explains. "We wanted the team to be able to work any time, any place, anywhere. So it didn't matter whether somebody was working from home, in a hotel room in Singapore or at three o'clock in the morning — they could do whatever they wanted."

The search for that last jigsaw piece was on.

## FINDING THE RIGHT FIT FOR THE FIRM

“People were asking for a great number of things when I first started at Ellisons, but in terms of the document management system, they wanted to be able to review documents online from home or from anywhere else and they wanted to securely collaborate with clients,” John explains.



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John Turner, Chief Operating Officer, Ellisons Solicitors



When it came to finding a DMS that would meet the needs of the employees and the firm as a whole, Ellisons had three major criteria the DMS platform had to meet:

- **First, it had to provide best-in-class security.** “After a thorough investigation, we came to the conclusion that NetDocuments offered the highest levels of document security available,” John says.
- **Second, it had to be cloud-based.** “NetDocuments was built for the cloud,” John explains. “Unlike competitive products, NetDocuments is a true native cloud system and this made it a very good fit for the way we work.”
- **Finally, it had to be P4W-compatible.** “Partner for Windows (P4W) practice and case management sits at the heart of our firm and we couldn’t do business without it,” says John. “[We] decided that NetDocuments was our preferred product because it integrates so smoothly with P4W out of the box. That was a significant benefit to us.”

Ultimately, NetDocuments checked every box (and then some) for the Ellisons team. “We needed to furnish our people with the ability to work anywhere and to work efficiently and that’s what NetDocuments offers,” John says.

### Making Fully-Remote Work a Reality

For anyone who’s undergone a digital transformation project like implementing a DMS, you know that choosing which platform to use is only half the battle — if that. Getting buy-in, managing implementation and encouraging adoption are all major challenges for a firm to get the full benefit of any piece of software. And fortunately, Ellisons handled every step of the process with finesse.

## GETTING BUY-IN FROM THE EQUITY PARTNERS

With new technology investments, Ellisons has a two-stage approval process: first, the Management Board, and then the firm's equity partners.

"When we went through the process, the equity partners felt that every other firm had a document management system, but we didn't," John says. "So that was quite an easy sell, because there was a perception out there that we were playing catch up."

But the real ace up their sleeve was talking about ROI.

"The number one thing to get it over both of those approval hurdles was to show return on investment," John explains. "We focused on the inefficiencies we were trying to overcome. How was NetDocuments going to help and what did that equate to in terms of resources? We started by looking at people's rates, the time spent doing various tasks — for example, we looked at the administrators and how they'd no longer have to photocopy emails to put them into a client file, because it's just a digital drag-and-drop."



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John Turner, Chief Operating Officer, Ellisons Solicitors



"We also looked at the benefits gained by other firms who've implemented NetDocuments, including a reduction in paper and print costs and the floor space saved by the removal of physical documents," he continues.

"It's difficult to quantify everything, but the key elements we measured were hourly rates and the amount of time spent on repetitive tasks that would be removed by a DMS," John says. "Once we started calculating what we could do with those hours, and the amount of fee income that would bring in, all of those benefits versus the investment — clearly it went through."

## A RISKY DECISION THAT PAID OFF

Change management can be challenging under the most ideal of circumstances. But in the middle of a global pandemic? That could be a big risk. Not to mention Ellisons had planned a merger with another firm just shortly before tackling their implementation.



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“Some people might say, ‘Well, why on earth would you want to do that?’” John admits. “But we decided to do it.”

Of course, choosing the right implementation partner is absolutely critical for success. For their NetDocuments rollout, Ellisons partnered with Advanced — and it was a huge win.

**Advanced** “We have nothing but positive feedback for Advanced and the implementation team,” John says. “Previously, we would have thought that the full implementation of a new system could not be done remotely, but now we know that yes, it can...and it went really, really well.”

“I told our managing partner, we can expect some teething problems, we can expect some bumps in the road,” he says. “But we saw no bumps in the road and it went in really smoothly. This implementation challenged the status quo and proved that the successful delivery model could be achieved in a new way.”

## ACCELERATING ADOPTION

With NetDocuments implemented, the rest of the rollout focused on helping team members get up to speed as quickly as possible.

The NetDocuments platform provides ample training material out-of-the-box, but Ellisons went a step further, creating a number of online videos and how-to guides to help people get comfortable with the platform and resolve issues independently.

“The idea was, if you are unsure about what you’re doing and you’re too embarrassed to make the phone call, those resources are all available.”

They even found a way to make the kickoff extra special. “On day one, you got a welcome pack which told you what was happening, when it was happening and what to do, what steps to follow,” he says. “Even an idiot like me could follow the six steps to make sure that I was up and running on day one.”

“We also had champions in every department of the business. We understood from doing some business analysis with each of those departments how they wanted their data, documents and client matters structured,” John explains. “That was all sorted out before we even got to the deployment. All of that pre-work was done. All that testing was done.”



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John Turner, Chief Operating Officer, Ellisons Solicitors



Surprisingly, the pandemic turned out to be a bit of an advantage as well.

“We felt that our people were more likely to accept change, particularly technology change, during the pandemic,” John says. “We were confident that was the case, and we actually found that to be true...Ultimately, our concerns about remote implementation were unfounded, and it was one of the best training projects we’ve done.”

### **Big Wins Across the Firm**

Now that the platform is implemented and in-use, Ellisons is already seeing the benefits throughout the firm. “NetDocuments has allowed us to work much more productively,” John says. But that’s just the beginning.

### **SEAMLESS REMOTE WORK**

Enabling the team to work remotely was one of the primary reasons Ellisons wanted to invest in a DMS — and they’ve been thrilled to make that a reality.

“Once we put in NetDocuments, then we could have people working anytime, anyplace, anywhere because they no longer have to come into the office and get physical files. It’s all there on the screen in front of them,” John says.



**“NetDocuments allows us to share documents and information easily with both colleagues and clients, no matter where they are.”**

John Turner, Chief Operating Officer, Ellisons Solicitors



### **ONE SOURCE OF TRUTH**

“We’ve got one version of the Truth now. Our practice management solution and document management solution are completely integrated, so you’re always talking on the same base of data with everyone. And it’s version-controlled with the right security and access.”

NetDocuments has made it easier for everyone to find what they need, when they need it — which has been particularly advantageous for firm leadership.

“The managing partner said to me that he was so impressed with the implementation of NetDocuments because when a partner was away, he was able to see exactly where we were in terms of a matter with a client,” John explains. “He could go in, see the emails, see the contract and he could see that it was all up to date without having to talk to the partner.”

### **ENHANCED COLLABORATION WITH COLLEAGUES AND CLIENTS**

Smooth collaboration has also been a huge advantage for the firm.

“NetDocuments allows us to share documents and information easily with both colleagues and clients, no matter where they are,” John says. “We can share version-controlled documents with clients. We no longer have to search for paper files or emails and there’s no need to photocopy and deliver them. This alone has saved us hours of time.”

Collaboration can sometimes become a security issue, but not for Ellisons now that NetDocuments is in the picture.

“Occasionally, we’ve had issues with people sending the wrong documents to the wrong people, and that can be a big problem from compliance and a data loss point of view,” John says.

“We had two or three of those reported in 2020, but since we’ve put in NetDocuments, we haven’t had any — touch wood — and that’s because you get that extra check when you’re deciding where to file that document or that email in the process.”

### **ATTRACTING AND RETAINING TOP TALENT**

Ellisons understands the importance of tech as they recruit new trainees and younger lawyers to the firm.

“There’s an expectation when you come into a 21st-century law firm that you can work remotely and that firms like Ellisons have a document management system,” John says. “So, when I talk about the DMS being the last piece in the jigsaw, it’s not only from a remote working point of view, but it’s also attracting and keeping the right people at Ellisons.”



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### **SO FAR, SO SATISFIED**

How does the team really feel about using NetDocuments on a day-to-day basis?

“We’ve just got the results back from an internal colleague survey on how the rollout went, how people are using the platform, what benefits they’ve seen so far. And I have to say we’re really, really pleased with the results. All of the indicators are that our people are really, really happy with it.”

### **What’s Next for Ellisons?**

The firm’s future with NetDocuments is looking bright as the platform helps make their lives easier and reduces costs.

## CREATING A PAPER-LIGHT ENVIRONMENT

“By moving all the information within the NetDocuments assignments, we are now able to file emails at the point of sending and place all documentation within the correct matter workspace. We have started to replace physical paper files and all of the problems and costs associated with them,” John says.

In fact, going digital with document management is leading to big changes in their property strategy.



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“Part of our property strategy is to review and reduce our filing, and therefore to reduce our footprint in terms of buildings and leases. That’s real money not being paid, or cost avoidance if you like, for Ellisons.”

## ANNUAL AUDITS FOR LEXCEL ACCREDITATION

“We’re Lexcel accredited, so every year we have an audit. And we’re really excited that this year, the auditor is going to be looking at electronic files rather than us pulling together goodness knows how many physical files and then delivering them at a certain time at a certain office for him to go through,” he says.

“There’s always a heightened sense of awareness when we have our Lexcel audit because it’s a very big thing for us to actually make sure that we demonstrate continuous improvement and that we are compliant,” John explains.

“This year, when he tells us all the files he wants to look at, we’ll be able to put them into a secure collaboration space and say, ‘There you go, have a look at them.’ I don’t think there’s going to be that added excitement because I think it’s going to be a lot more straightforward. It’s going to be a lot more efficient. It’s certainly going to save my compliance team so much time. It’s the next evolution for Ellisons.”

It’s just one more fantastic byproduct of having a world-class DMS system in place.

## MAINTAINING THEIR LEGACY

There's no doubt about it: NetDocuments is making a difference for Ellisons Solicitors.

"When we've asked what people would like next, they want to explore more of the enhancements and toolsets within NetDocuments. They want to understand what more can be done. I guess you can expect that from lawyers," John says.

For a firm as focused on client relationships as Ellisons, all the benefits of NetDocuments help them deliver on promises and keep up their legacy of service.

"I think it's a bit like an iceberg," John says. "Our clients only see the top part of the iceberg. They actually don't see what we've done behind the scenes, but they get the benefits from it. They get the benefit of potentially a faster service, a slicker service, a more efficient service. I can share a collaboration space that is ultra-secure where we can work on documents. Those things have worked really well for us."

All in all, it's been an enormous success. "We have no hesitation in recommending the benefits of NetDocuments to other firms," John concludes.

## ABOUT NETDOCUMENTS

NetDocuments is the **leading cloud-based document and email management solution** to securely store and organise documents on a single platform. Backed by **20 years of experience in cloud innovation, over 3,400+ companies worldwide trust NetDocuments** to secure their data while increasing productivity and team collaboration.

Make the move to the NetDocuments cloud to get the speed, mobility and industry-leading security companies worldwide are already taking advantage of.

Visit [www.NetDocuments.com](http://www.NetDocuments.com) or call us at **+44 20 3129 9324** to learn more today.