Facing Down the Surprising Costs of Email & Document Management
A look at the costs of today's document management solutions and what to do about them

The business of law today operates at unprecedented speed. The pace of change, demands on lawyers' time, and breadth of knowledge that attorneys need to access, process and manage is reaching new levels. Technologies have promised to help, yet, traditional manual entry document management systems (DMS) just contribute to the problem.

A conventional DMS requires that law firms fulfill three steps:

1) Devise a categorization scheme for all documents (called a global taxonomy);
2) Mandate that all at the firm upload or resave their documents into the DMS; and
3) Require users to fill out a profile for each document that tells the system more about it (e.g., it's a contract or memo, with this client number etc.).

Expecting lawyers, who only generate income for a firm if they are conducting billable work, to tag and file documents into a centralized system of predetermined taxonomies is simply unrealistic. As long as the lawyer can access her own documents, she lacks both the time and the incentive to remember to upload the file to the DMS itself. That is of course, until the lawyer wants to review one of her colleague's documents and is frustrated to discover that he too has failed to save the file to the central DMS. That traditional DMS tools rely on users manually uploading files and creating document profiles explains why we've found that typical firms only capture approximately 50% of their information.

Moreover, while 80% of the intellectual property inside firms is communicated or stored in email (Gartner), the leading DMS solutions used by law firms today were designed in the 1980s – before the Internet and mobile computing – and either do not automatically include emails as part of their document collection process or require even more manual steps to get those messages into a central system.

How Bad Is It?

Recent research confirms what many lawyers and their administrators experience first-hand.

Wasted time and lost productivity are significant.
According to a September 2012 IDC white paper, information workers (including lawyers and other professionals who are connected to the Internet and create, edit, review and/or approve electronic documents) spend 11.2 hours a week dealing with challenges related to document creation and management. At least six hours of this is wasted time. While the data is a few years old, the statistics remain relevant because traditional DMS solutions still dominate the legal market a, and less than 40% of law firms with 50 attorneys or fewer have purchased a DMS solution at all (ILTA).

As the table below from IDC demonstrates, lawyers, paralegals and other information workers lose up to 2.3 hours a week searching, but not finding, the right documents and another 2 hours recreating documents that can't found. All told, IDC reports that time wasted in document creation and management activities cost firms $9,071 per information worker per year, or a 9.8% loss in the firm's total productivity. For a firm with 100 lawyers, that amounts to more than $900,000 every year.

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Time Spent on Document Management Challenges

	Hours Spent per Week	% of Time Spent	Hours Wasted per Week	% of Time Wasted	% of Organizational Productivity Lost
Pulling and compiling information for different files into one document	3.5	7.2%	0.9	1.8%	1.4%
Dealing with paper document problems	3.5	7.0%	0.9	1.7%	1.4%
Searching for, but not finding, online documents	2.3	4.9%	2.3	4.6%	3.7%
Recreating online documents because the current or right version can't be found or got lost	2.0	4.0%	2.0	4.0%	3.2%
Total	11.2	22.7%	6.0	12.1%	9.8%

Based on data from 840 information workers in the US, UK, France, Germany, Australia and Japan. Percentages based on reported 49.5 hours of work per week. Source: IDC's Information Worker Survey, June 2012

Non-compliance is widespread

A 2015 impact study on electronic content management conducted by the Association of International Information Management Professionals (AIIM), indicates that one in four workers fail to conform with document management and retention rules. And that study doesn't even account for lawyers who tend to be more independent than most professionals.

Mobile information isn't accessible

Additionally, AIIM says that 81 percent of organizations report difficulty accessing information across multiple platforms, including mobile devices. Given how rapidly lawyers are going mobile according to Mobility Metrics: Are Law Firms Prepared for a Portable Future?, a study released in December 2015 by Ari Kaplan Advisors and Mobility Metrics, this statistic is particularly disturbing.

> **Despite management's best efforts, the Association of International Information Management Professionals reports that one in four workers still fails to conform with document management and retention rules.**

What's a Law Firm to Do?

It's clear from this research that deploying 20th-century DMS technologies no longer makes sense. Instead, progressive law firms are turning to automated DMS tools like MetaJure that take a 21st-century approach drawing on the advantages of automated data collection technology and smart algorithms.

Indeed, MetaJure's NextGen solution was developed by lawyers frustrated by the traditional document and email management options available to law firms and legal departments. Its founders believe that technology should make a lawyer's practice more cost-effective and help him to deliver a higher level of client service, not slow him down. The following provides an in-depth look into this new approach.

21st-Century Approach Designed for Today's Email and Document Deluge

Here's how MetaJure's DMS technology addresses the growing number of digital documents:

(1). Automates document uploading.

Instead of making users upload all of their documents—including email– into the system, MetaJure does this automatically. Without users having to do anything. MetaJure lets firms leave its documents where they are now, because the system finds 100% of the documents in the organization—whether they're on servers or file shares, in another DMS like Microsoft Sharepoint®, Worldox®, iManage® and NetDocuments®, or just on an individual lawyer's PC or mobile device.

MetaJure even finds and stores items like documents attached to emails, something few users remember to resave into a conventional DMS. And, the technology automatically processes all image-based documents (think PDFs, JPEGs, and TIFFs) via optical character recognition (OCR) technology, making that information fully accessible.

MetaJure's software works automatically by continuously crawling, preserving and indexing documents. And, because MetaJure's powerful technology works in the background, it doesn't affect the performance of a firm's computers or systems.

(2) Smart document analysis and indexing doesn't require users to add information.

Instead of relying on users to manually tag and profile documents, MetaJure uses sophisticated, state-of-the-art computer analytics to classify and index them. MetaJure analyzes not only the words of the document, but also the context (which includes everything from which folder the document is in on a PC or network folder, to the properties of the document, the author, client matter number and more).

This means MetaJure captures a great deal about each document without requiring lawyers to manually add information in each case or save that information to a specific locale or under a specific name or number. And if a firm already has a formal process for how documents should be named and filed, their lawyers and staff can just keep following that system without having to learn anything new. Only now they can be sure ALL the documents that each person has permission to see, including emails, is there.

(3) Retrieval is intuitive, fast and powerful.

Finally, rather than finding documents based on the profiles and tags users have manually assigned them, MetaJure uses smart, algorithmic search-based retrieval to find what users seek—and returns the most important and relevant information right at the top of the screen. Whereas conventional DMS systems require lawyers and staff to be trained how to use a new application, MetaJure leverages the retrieval method that everyone already knows from conducting web searches on Google. On top of that user-friendly interface, MetaJure adds powerful customized filter options that enable users to zero in on the documents they need.

Let's say, for example, a lawyer wishes to identify all documents related to a particular client litigation matter, including all email correspondence between her law firm and the client. Conventional systems require that she searches for and types in the file number or folder name under which she filed all matter-related documents. She also needs to trust that all of her colleagues have indeed saved their information into the right folder or under the correct matter number. With MetaJure, however, the lawyer simply types words associated with the matter into a search box, confident that the system returns all the relevant information he needs. He can still find this information even if his colleagues use variations of names in the documents or if the lawyer doesn't have the exact name of the litigation matter, client name and/or number.

(4) The added benefit of understanding context.

What's more, because MetaJure lets users see all content surrounding a search, it helps attorneys understand the context surrounding a document. For example, let's say a partner is reviewing a contract that was negotiated between a different lawyer at the partner's firm and another attorney. A search query with MetaJure will identify

emails that may be associated with the document, revealing the rationale and arguments that led to specific language in the contract.

The Future

Imagine when firms will be dealing with 100 times as many emails and documents as they are now. Will law firms be able to justify the time and cost of manually tagging and organizing them all? Firms need to deploy the technology of the future to keep up with, let alone stay ahead of, this document deluge. The best news is the technology of the future is available now with MetaJure. And it's faster, more robust and more affordable than any of the manual systems on the market.

Contact MetaJure for more of our latest thinking about document management for law firms.
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