

MetaJure Needs Analysis

1. How do you currently manage your documents and emails? _____

2. How does your firm currently organize your documents and emails?
 Client/Matter/Document Type
 Client/Matter folders in Outlook
 In another way (please explain) _____
3. Do your attorneys and staff have a system for sharing the information in emails?
 Yes (Please explain: _____)
 No
4. Is sharing email information important to you? Yes No
5. What is your policy regarding saving documents on PCs? _____

6. Is it important that all of your documents are OCR'd and searchable? Yes No
7. What problems are you experiencing regarding how information is managed at your firm?
 Searching and finding documents across the firm
 Accessing legacy data
 Sharing/searching emails across the firm
 Work product is saved on individual PCs
 It takes too much time to tag and profile documents
 Getting agreement on filing structure and how to organize information at the firm
 Compliance –getting all to follow the rules about where and how to save documents
8. Where are your systems housed? On-premise Cloud Both
9. Where is your data stored:
 On file shares On PCs
 In a document management system? (Which one: _____) Other (Please explain: _____)
10. How many are employed at your firm?
Attorneys _____ Secretaries/Assistants _____
Paralegals _____ Administrative Staff _____