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A Top-Tier Firm Future-Proofs Their Business with First-Class Partnerships

About Magrath Sheldrick

Headquartered in central London, Magrath Sheldrick LLP is one of the UK's most successful business immigration practices and a major force in immigration and employment law. Their diverse client base includes some of the world's leading businesses, private individuals, employers and senior executives from around the globe.

Replacing an Antiquated All-in-One

For Magrath Sheldrick LLP, making a digital transformation was a massive shift. The firm had been using an all-in-one practice management suite (PMS) for years, but over time they realized that "it was *okay* at everything, but it wasn't particularly outstanding at anything," explained Magrath's IT Director, Nick Doughty.

The decision was further accelerated when they learned that the PMS was going to end-of-life at the end of 2020 — not to mention the increased need for flexibility brought on by the Covid-19 pandemic.

"It really forced us down a cul-de-sac where we had no choice but to replace it," Doughty said.

DON'T PUT ALL YOUR EGGS IN ONE BASKET

While it may have been simpler to switch to another PMS and replace everything in one go, the firm had learned a valuable lesson: "We didn't want to put all our eggs in one basket," Doughty said.

"What we wanted to do for the future was minimize the risk of this situation occurring again," he continued. "We didn't want a software solution that would impact everything we need to run the firm if its company got taken over or it went end-of-life."

The team decided to go for a more modular approach to their tech stack as part of their risk management strategy. As a bonus, this approach also allowed them to "cherry-pick the best-in-breed systems and find the best solution for each part of the firm," Doughty said.

Their search for a document management system (DMS) led the firm to NetDocuments.

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PREPARING FOR THE NEW NORMAL

The long-term impact of the pandemic inspired new priorities for the firm: "Obviously with the 'new normal,' our model of working will change," Doughty said. "We're still in the planning stages, but the one absolute is that we're not going to go back to five days a week in the office."

With that knowledge, they knew they needed a cloud-based DMS.

"Being in the cloud is important for us because it just gives us the flexibility to accommodate our staff anywhere," he explained. And during the lockdowns, they've needed it as team members have worked remotely from Norway, Spain, Turkey, and more.

"The cloud just offers you that flexibility where, as long as you've got an internet connection, you're pretty much good to go wherever you need to go," he continued. "With the new normal, that convenience and flexibility needs to be built into people's day-to-day functioning."

MAKING THE TRANSITION SMOOTH AND SECURE

In the course of choosing a DMS, Doughty also recognized the importance of ensuring a smooth transition between the two systems. The fact that NetDocuments would seamlessly link to their existing PMS was vital.

"It was very important that we could marry up the two systems and make sure they spoke to each other, because there was still that transitional period where they had to live in unison with each other," Doughty explained. "That connection was *key*."

The platform's security infrastructure played an important role in the decision as well.

"Our data is our most valuable asset, and if we're going to entrust you with it we need to have very strong confidence that you're managing our data responsibly and securing it," Doughty said. "It's clear that NetDocuments has the provisions in place to make sure our data is safeguarded and always going to be there when we need it."

FINDING A TRUSTWORTHY PARTNER

Above all, the firm placed a high priority on the team behind the tool. "I will be completely honest — when we are looking at potential suppliers, we always view them as relationships," Doughty explained.

"The most important thing for me is trust," he said. "Almost from the first meeting, you can get a very strong feeling as to whether you actually trust the people you're going to deal with."

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> "

That's a lesson Doughty has learned the hard way. "We've had a few relationships that have gone sour because the trust was gone," he explained. "You're always second-guessing... *Is that really necessary? Are they completely upfront?*"

In several conversations with potential suppliers, Doughty wasn't impressed. "It felt like they were exaggerating their services, and there was a bit of mudslinging," he said. "They just wanted to come in for the kill, make as much as they could from the deal and then move on to the next one."

 peregrine cloud®

But his experience with NetDocuments — and implementation partner Peregrine Cloud — was different. "Is this the bit where we say that Mike was brilliant?" Doughty joked.

"Both Mike [from NetDocuments] and Tony [from Peregrine] were so genuine," Doughty said. "Tony is probably one of the most genuine engineers I think I've ever worked with. I don't think he would ever give me a reason not to trust him. There's a very strong trust with Tony and Mike."

And while NetDocuments offered numerous other benefits to the firm as a robust, fairly-priced solution, "I think that trust was the most important thing for us," he said. "That's really the main reason we went in with NetDocuments."

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A Major Remote Roll Out

Magrath received strong support from their chosen implementation partner, Peregrine Cloud. But implementing in the middle of a pandemic is easier said than done.

"Normally we're on-site and roll outs are fairly straightforward," said Doughty. "But this was the first major roll out we did remotely, so that was the first challenge."

As IT Director, the responsibility for planning the roll out fell squarely on Doughty's shoulders — and he made a decidedly unorthodox decision: "I decided that I was going to onboard everyone individually over a two-week period, log in with them remotely, install the new system and explain the process."

IMPLEMENTING THE WHOLE FIRM BY HAND

It was a bold move — but it was what his team needed. "I'm the big, bad Wolf that's forced them to learn something new," he admitted. "And that means people are looking to us for a little bit of guidance and reassurance. Since we are the ones that are disrupting their day, we have to do everything possible to make sure that we help as much as we can."

"People were concerned about having a fundamental part of their day disrupted," he explained. "They were just so comfortable with our previous system and our users are no different than anyone else — people don't like change."

Leading a remote, manual rollout was a significant change for Doughty as well — but fortunately, Peregrine provided clear scripts and support to help him through the deployment process.

"There was a little bit of a worry for me too," he admitted. "We've never done this before, so it was a bit of a learning curve. But we tried to work out what could potentially go wrong and how we could minimize that risk, and ultimately, it was a very easy process."

But his commitment to that little bit of hand holding paid off in the end.

"By the time we came to actually go live, I was quite comfortable that everyone was confident in what was happening and how it was going to happen," Doughty says.

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OPEN DROP-IN TRAINING SESSIONS
Doughty came up with another innovative solution to support his team once they were live: open Zoom sessions that people could join for live answers to their questions and concerns.

"On the Monday morning we went live, we frequently had around 20 people in there," he explained. "But as I'd help solve one person's problem while presenting it on the screen, you'd instantly see five or six people leave at the same time, because obviously they were having the same issue or concern."

The sessions were definitely a big win for the team.

"I think the drop-in sessions worked brilliantly," Doughty said. "What we didn't want was people sitting at home becoming more and more frustrated. It's really important to get a good start on these sorts of projects, and if they start going a little bit south at the start it's very difficult to recover from."

He recognized that leaving people with a support number to call would only increase their frustrations. "If they joined a drop-in session and we didn't get to them immediately, at least they could listen to problems that other people were experiencing and things they didn't know how to do," Doughty explained. "And I think that reassured them that they weren't the only people that were having some difficulties. That in itself proved really beneficial."

Ultimately, the drop-in sessions were so successful that Doughty kept them going for a few extra days. "I think people sort of found them to be a bit of a comfort blanket," he said. "I think they just liked to know it was there."

So how did the team feel about the implementation process when everything was all said and done?

"It was very, *very* well received. Very successful," Doughty said. "I don't think I've had any negative comments about the system. It's all been positive, and they all think it's a big improvement on what we used to have."

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STRONG COMMUNICATION AND SUPPORT
Throughout the process, Doughty had lots of help and support from Tony Foy, Peregrine Cloud's owner and lead consultant.

"Tony was a huge part of the implementation, and he was a big reason that it went smoothly because he was very attentive," Doughty said. "I think our initial thoughts were correct in that Tony looks at it as a long-term relationship and not just getting this one out of the way as quickly as possible and moving on to the next one."

Trust and superb communication were central to the project's success. "I never had the feeling that I didn't know what was going on," Doughty explained. "Even when things went a little bit wrong, Tony told me — and that comes down to trust again, that he never tried to hide anything from me."

"I have huge respect for his work and what he did," Doughty continued. "He made the migration seamless, and we haven't missed a beat because of him."

A Solution That Pays Off

Now that the team is implemented, they feel more confident than ever in their decision to go with NetDocuments.

"The solution itself is great," said Doughty. "It does everything that we were hoping for and more. There have been some added bonuses in there that we actually weren't aware of at the outset, and we're still discovering stuff now that's quite nice."

"NetDocuments is feature-rich. It isn't busy. It's a trusted, pure-cloud solution which is obviously really important to us."

INSTANT ROI ON SECURE SHARING

One of the stand-out features of NetDocuments has been the many ways users can securely share documents. "NetDocuments has given us some really good options in how we share data with our clients and internally," Doughty explained.

"For us, the potential for data loss through emails is always a key area of risk management," he continued. "— with clients, and internally.

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Previously, Magrath had used an expensive third-party tool to encrypt their emails and send large files, but because the secured link functionality is built into NetDocuments they no longer need that tool.

"There's an instant return on investment," he said.

CONFIDENT COMPLIANCE

"Because of GDPR, it's important to have only one copy of a document," Doughty explained. "Lawyers are notorious for living in Outlook and literally using the sub-directories as a case management system. But with that approach, you'll find loads of orphan copies in draft folders in the sub-directory within Outlook."

> "We have confidence that we've only got one copy of that document, which is key because if the client enables their right to be forgotten, we need to be confident that we are removing everything we hold for them."
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By using secured links, the team is able to remain compliant without sacrificing their productivity.

"We have confidence that we've only got one copy of that document, which is key because if the client enables their right to be forgotten, we need to be confident that we are removing everything we hold for them," he explained.

Data retention policies have also been a valuable feature for the firm.

"The ability to run the retention function on all our data is huge," Doughty said. "That was a massive challenge with our previous system, whereas within NetDocuments you can ensure you're only keeping the data for the time that it's actually viable."

Though basic, these features have given Doughty — and the rest of the firm — greater peace of mind about their data and compliance with regulations like GDPR.

"When I first started a few years back now, the key was to have 1,000,001 backups of everything. You could never have enough backups," he explained. "But now, data is a liability and you want to get rid of that liability as quickly as regulations allow. So the retention function is really key for us, and we can be confident that when we send across our retention policies, we are adhering to them as well."

FLEXIBILITY AND STABILITY

While the team has continued to work from home, the ability to do so seamlessly has been a huge benefit for the Magrath team.

"Our previous system was never designed to be a remote system, so there were quite a few technical issues and user frustrations," Doughty said. NetDocuments can function equally well from a remote location or in the office. That was a huge win for us."

Innovating for Today and Beyond

Implementing any change across your organization can be a journey. But when done correctly, the reward of a modern work experience is well worth the challenge.

With the help of Peregrine Cloud and NetDocuments, Doughty was able to crack the code for a successful switch to the cloud. "Communication was the key to the project being successful," said Doughty. Whether those communications were daily check-ins with Peregrine Cloud or the drop-in training sessions, it paid off for Magrath Sheldrick to provide their teams with access to system experts and peers.

Now that training has completed, Magrath Sheldrick's teams are enjoying the benefits of a seamless work experience, time savings, and reduced stress (at least when it comes to their tech).

ABOUT NETDOCUMENTS

NetDocuments is the **leading cloud-based document and email management solution** to securely store and organize documents on a single platform. Backed by **20 years of experience in cloud innovation, over 3,220+ 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** or call us at **(866) 638-3627** to learn how more today.