A first-time DMS for
Lindsay Kenney LLP in Vancouver
... and they chose Worldox.

By **Dirk Fleming,** IT Manager   April 5, 2011
        Lindsay Kenney LLP

Challenge:
To get this large firm up and running on a first-time ever DMS platform – and to quickly train/orient/ reassure certain change-resistant staff.

Solution:
Worldox GX2 selected and installed; extensive training and follow-up sessions conducted for all employees.

Result:
A strong implementation team made this a smooth transition … now some of our most skilled Worldox "super users" are those who were initially least comfortable with the change.

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 Lindsay Kenney LLP (www.lklaw.ca) is a full service Canadian west coast law firm with approximately 50 lawyers and in total about 140 staff providing legal services from offices in downtown Vancouver and Langley, British Columbia.

For many years, the firm managed their electronic documents and files without a document management system (DMS), by using Windows Explorer to navigate folders and Windows Search to execute searches when needed. However, we reached the point where we had approximately 500 thousand documents (mostly Word documents), sorted by year, client, matter; they were not searchable in an efficient way. We wanted to select a DMS that could easily store client-related emails in the same repository as the other documents, and provide efficient searching functionality.

We looked at several DMS solutions but were concerned about the high cost of the system implementation for some of them. The features and functionality of our two final candidates were comparable, so there was not a major difference there. The software licensing costs were not drastically different either, but the implementation costs for Worldox using Baker+Cadence Solutions (BCS) (www.bakercadence.com) were considerably lower. Also, Worldox does not require a SQL server database, and we could use a workstation-class machine as the Worldox indexer rather than a server. We spoke with a number of Worldox clients who were approximately our size, and we received favorable feedback, so in September 2009 we signed the purchase order for 140 concurrent Worldox licenses.

To facilitate a successful implementation project we worked with Bill Baker and Mike Crouch of BCS, to set up planning meetings prior to the implementation. They spent two days with the Lindsay Kenney LLP team. Mike Crouch met with user groups, departments, management and IT staff to determine the profile structure - as each document in Worldox is

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profiled with fields such as client, matter, author, doc type - and planned the training schedule. Charlotte Quiroz of BCS was the designated trainer. We knew her role was going to be incredibly important since some of our employees were very resistant to the idea of change and the training was intrinsic to the project's overall success.

BCS recommended that we leave the pre-existing legacy documents in their current document structure and build a text index of them so they would be all text-searchable by document name or content. The legacy document store was marked read-only so when lawyers or staff found a document, they would then need to profile and save it into the Worldox repository. It took a full weekend for BCS to build this text index since we had such a large volume of files.

There were no conversions or data migrations because we did not have a prior DMS. The only integrations we needed to worry about were with applications we used where Worldox would need to pop up the *File/Open*, *File/Save* and *File/Save As* commands; these were handled by hook files that Worldox technical support provided.

For the most part, the Worldox implementation went smoothly. One of the recommendations from BCS was to have staggered rollouts. We only rolled out 10 or 12 users at a time rather than doing a full cutover for the entire firm all at once. The lawyers and staff would attend training and when they returned to their desks, Worldox would be live, so they could apply their newly-learned skills immediately.

We did experience a technical problem when the users were moving legacy files into the new Worldox structure. Profile data was being dropped during the move and the document name was not appearing within Worldox – only the document number. This issue appeared during the first few days of the project.

BCS discussed the problem with Worldox software developers as they had never seen this problem before. An investigation was conducted. BCS ran tests on different workstations and operating systems, and found that the users having the problems were on the Vista operating system, and Vista was also the operating system on the Worldox indexing workstation. BCS's research showed that there had been some problems reported with Server 2008 and Vista workstations, the issue stemming from a new Microsoft file handling logic called SMB. BCS conducted some more tests and found that

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the problem was resolved by using SMB 1 protocol instead of SMB 2. Worldox technical support created a utility to correct the issues with the documents that had already been converted during the first two days. We were kept informed by BCS and Worldox during the investigation, and I was involved in many of the conference calls. Eventually this issue was completely resolved and we had all worked as a team to make that happen.

Another issue that came up was that our Langley users experienced slow loading of the profile tables because they were being downloaded for every use from the Vancouver server. BCS configured the system to clone the tables to Langley several times a day, thereby speeding up searching in the Langley office.

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As mentioned previously, we knew that training was going to be a critical part of ensuring Worldox's successful adoption at our firm. Our Managing Partner, Kelvin Stephens chaired our Worldox project, and ensured that all staff attended training. In total, there were six days of training: four in Vancouver and two in Langley. Each session was 3 hours long with 10-12 users at a time, and we used already converted data to make the training a more 'real world' experience. This allowed us to train based on real-life documents rather than sample documents, providing a more accurate and realistic platform. In order to accommodate the staff's busy schedules we held training sessions over several days and also ran individual sessions for staff that were out of the office during the core training sessions. We also had BCS come back two months later for two days of follow up training sessions. The benefit of this was that users were now familiar with Worldox and had been using it daily. The follow up sessions allowed staff to ask BCS about specific issues and additional functionality.

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In terms of how Worldox was received, some people were resistant to the change whether it was meant to improve their work or not, so we did have some users that were reluctant to adjust to the new system. BCS walked the floors of our offices after the training sessions to help users adjust and troubleshoot any issues that they had. They did one-on-one sessions with the users that struggled or were reluctant to start using Worldox. Our helpdesk calls did spike after each user group went live, as we could have predicted with a brand new rollout, but once the preliminary learning curve was flattened out, the calls dwindled in number.

The lawyers like being able to save and profile emails into the central Worldox repository and are now able to find a document very quickly,

either by searching by name or using the text search function. They can also find precedents easily and quickly.

Overall, Worldox has become part of our culture and nearly everyone using the software benefits from and appreciates its capabilities. BCS and Worldox Technical Support did a very good job of implementing the technology and keeping us informed as all the implementation issues were resolved. It was crucial to the project that our Managing Partner, Kelvin Stephens, and Managing Director, Carmen Arndt, were champions of the project, so that adoption and buy-in came from the top. I'm very glad that we have the Worldox DMS installed now – it has brought a great deal more efficiency to the firm.

We have been using Worldox for approximately 10 months and many of our users are now 'super users' of the product, including some of our 'resistant to change' users. We now have approximately 315,000 documents within Worldox, comprised of new documents and converted documents.

Another feature which we use a lot within Worldox is the *Ethical Wall* function. This is easy for an administrator to set up and assures that when required we can set up the appropriate restrictions on sensitive documents. These files do not show up in searches unless the user has access to them.

A final word from our Managing Partner, Kelvin Stephens:

> *"I am thrilled with Worldox; it does everything it was represented to do. The conversion was done efficiently with little disruption and the product performs well."*