

The Right Document Management Solution at the Right Time: Driving Adoption and Efficiency at Foulston Siefkin

FOULSTON FOULSTON SIEFKIN LLP

Founded in 1919, Foulston Siefkin is the largest law firm in Kansas, employing nearly 90 attorneys in offices in Kansas City, Topeka, and Wichita. The firm's clients represent a cross-section of the Kansas economy, ranging from major agriculture and energy producers to health care providers and insurance companies. Practice areas include civil and complex litigation, business matters, employment and labor, and health care law.

Foulston prides itself on its forward-thinking and collaborative culture, which relies upon quick and seamless information and document sharing. When a key technology initiative needed some fresh perspective and insight, Foulston turned to Affinity Partner Debbie Foster.

THE CHALLENGE

User adoption is a critical success factor in any software implementation, and the team at Foulston was struggling with buy-in after a DIY document management system rollout. While the system was a good fit for some members of the team, it simply didn't meet the needs of the entire firm. After three years, only about 40 percent of the firm had adopted the new system, and the partners determined that it was time to rethink their approach.

Andrew Nolan was one of two team leaders tapped to spearhead the effort to assess the needs of the firm, identify the best document management solution, and ultimately put it into place.

"When we first started looking at providers, Ari Kaplan's name had risen to the top for us," says Nolan. "Ari came out and did a presentation for the firm, helped us work through some of our initial questions and concerns, and then gave us the names of several firms, including Affinity, that could help us with the actual software implementation."

Shortly thereafter, Nolan and his colleague Michael Norton had the opportunity to meet with Foster at the Legaltech conference in New York City. Nolan and Norton had interviewed other firms for the project, but it was Affinity's holistic approach—the incorporation of people, process, and technology—that ultimately sealed the deal.



"Everybody else just wanted to implement a technology solution," says Nolan, "and we knew we didn't just have a technology problem. Debbie was talking about the technology and the change management."

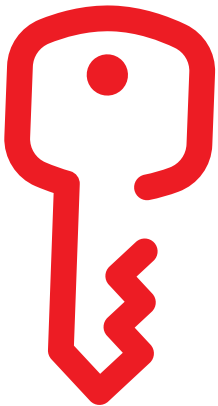


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THE SOLUTION

Together with the Affinity team, Foulston began taking a hard look at the firm’s challenges—particularly with regard to collaboration—and the ways in which their existing technology was contributing to them.

“We were being told by a couple of groups within our organization that they couldn’t adopt the document management solution we’d put in place because it didn’t work with their processes,” explains Nolan. For that reason, collaboration had become virtually impossible. While some people were using the new document management system as intended, others were storing the same types of documents in a file share. Determining where to find the information necessary to pick up a matter where someone else had left off was a challenge, resulting in wasted time and frustration. This, says Nolan, was just not consistent with the way Foulston does business.



“It is key to find a fit between the technology system chosen and the internal work culture of an organization. In Foulston’s case, the existing document management system wasn’t fostering high adoption rates amongst employees, as it didn’t align with internal work processes. I knew the Foulston team wanted to first be heard when it came to how they got their work done. That would allow them to select a document management solution that truly worked for the needs and work styles of their practice groups,” explains Foster.

As part of the discovery process, Affinity interviewed representatives from each of the firm’s practice areas to determine how their work was done, what their challenges were, and where there might be opportunities for improvement. The results of these interviews were compiled into a comprehensive report outlining the firm’s strengths and weaknesses from a process perspective and detailing proposed solutions, including the implementation of a new document management system better aligned with the firm’s needs. This report, Nolan says, ultimately became a roadmap for moving the technology committee, the IT team, and the entire firm forward.

After reviewing several document management options, the Foulston team, with Affinity’s support, determined that NetDocuments was best aligned with their goals and engaged Affinity to implement it.

“The document management committee was formed at Foulston to assist with product selection, and they took their responsibility very seriously. After reviewing other products, the team chose NetDocuments. We knew the NetDocuments cloud platform was going to be the best solution for Foulston because of its robust feature set. Its ability to enhance collaboration while still keeping client data safe and secure is impressive. NetDocuments enables users to work seamlessly from anywhere on the same matters through one simple interface. This would facilitate the teamwork and open collaboration the Foulston team was searching for in a document management solution,” says Foster.

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Beyond the technical expertise that Affinity would bring to the implementation, effective change management, it was determined, would be the key to a successful launch.

“We knew that we needed to be in constant communication with the entire firm about what was going on, the decisions that were being made, and the timelines,” Nolan explains. “Debbie would send an email to all of our users on a biweekly basis letting them know how things were going and what to expect. She constantly reminded people that when you implement a system, you have to expect that it’s going to get worse before it gets better. You just keep moving forward, and once you really know how to use the new system, then you see the benefit. It was this combination of email communication, in-person interactions, and video training that really helped with the ‘people’ aspect of the project.”



THE RESULTS

Foulston’s December 2018 rollout of NetDocuments was, according to Nolan, an unprecedented success. “Even some of the people who’ve been critical of our technology rollouts in the past have had very positive things to say about NetDocuments, and people seem to be adopting it very well.” Nolan notes a new, more positive attitude toward the technology in general, which he credits both to

the intuitive nature of NetDocuments and Affinity’s focus on people and process during implementation.

NetDocuments, says Nolan, has helped to facilitate collaboration and improve users’ confidence in their documents, which has dramatically improved Foulston’s ability to serve its clients.

His advice to firms considering a new document management system?

“Don’t overestimate your ability to implement document management on your own. Look to experts who’ve done it before, and find someone who’s thinking about not just the software, but the complete picture.”

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