5 Tips to Prepare Your Law Firm for a NetDocuments Migration

A smooth NetDocuments migration starts well before the data begins moving. The more your firm can prepare in advance, the easier it will be to make decisions, keep the project moving, and reduce disruption for attorneys and staff.

Here are five things to focus on before your migration begins.

1. Know What Data You Are Moving

Take time to understand where your documents currently live and what needs to be migrated.

Identify active and closed matters, shared drives, personal folders, legacy systems, and any other locations where important documents may be stored. This is also a good time to identify outdated or unnecessary data that may not need to move.

2. Identify the Right People for the Project

Your migration team should include people who understand both your technology and how the firm actually works.

Include representatives from IT, firm administration, and key practice areas. These individuals will help make decisions about document organization, access, workflows, and other issues that may affect users.

3. Be Ready to Make Decisions About Organization and Security

NetDocuments may organize information differently from your current system.

Before the migration, your firm should be prepared to discuss how matters and documents should be structured, what information should be used to classify documents, and who should have access to sensitive information.

Making these decisions early helps prevent delays later in the project.

4. Clean Up Where It Makes Sense

You do not need to reorganize everything before a migration, but some basic cleanup can make the process easier.

Remove obvious duplicate files, outdated folders, unnecessary personal content, and data that should no longer be retained. Avoid spending months trying to make the old system perfect. Focus on the items that will make the new environment cleaner and easier to use.

5. Prepare Your Users for Change

Even when the migration goes smoothly, NetDocuments will introduce changes to how attorneys and staff save, find, and manage documents.

Let users know why the firm is making the change, what they should expect, and when training will take place. Giving people advance notice and setting clear expectations can make adoption much easier.

Good Preparation Makes Migration Easier

A NetDocuments migration involves technology, but preparation is largely about people, decisions, and data.

Firms that understand their data, involve the right people, make key decisions early, and prepare users for the change are in a much stronger position for a smooth transition.