

# 3Kites Consulting

## The archipelago of documents

During my time of working for large law firms, document storage was pretty straight forward and, I felt, necessarily dictatorial – you could store documents in the document management system (DMS) but nowhere else! This was in the 80s and 90s when IT teams had complete responsibility for (and control of) a firm's IT systems. However, the landscape is dramatically different today and products such as case management tools, know-how repositories, SharePoint and Teams have joined Outlook and File Explorer as alternative locations to the DMS for storing both documents and emails. Some of these are organised by end-users (as opposed to the IT team) into beautiful structures that suit the very specific needs of smaller groups of lawyers and secretaries who may feel empowered by this improved access to client files and the like.

The problem comes when working on cross-group matters or when needing out-of-hours access to a file with limited timelines available. When this involves matter-related documents, the firm runs the risk of not being able to fulfil its duties to be able to identify all files and documents about a client and easily check the status of a matter. Now the very structure that works for one group may work against another... the ease of storing in Teams may fox a user who is only aware of file shares. What we have ended up with is an archipelago of independent file stores with different organisational structures, often in different systems. The longer this situation exists, the harder it is to unravel and the greater the impact on users when adapting to more standardised, cross-firm ways of working.

However, there are ways to reconcile these different approaches, bridges to join the islands in the archipelago. Many DMSs include integration tools that will provide support for or connection with other systems including more niche, case management tools along with de-facto standards such as SharePoint and Teams. The important thing is to start with both structural/organisational and naming strategies that can span your separate systems, aligning these with one repository that can provide a single source of all documentation – and this should be the DMS. 3Kites can help you to understand the requirements driving the island approach and assist with designing structures and naming standards that reconcile these needs, whilst your DMS vendor should be able to assist you with any technical set-up.

**Paul Longhurst, 3Kites Consulting, June 2021**

If you'd like to know more about how 3Kites can assist your firm, then please contact [Danielle.Leacock@3Kites.com](mailto:Danielle.Leacock@3Kites.com)