

How to Assess Document Management Needs and Priorities

There is no better way to develop reliable insights about the way the department's document management system is helping or hindering productivity in the Law Department than to ask for direct feedback from users. With properly designed survey tools, this feedback is very easy to gather even if your users are spread out across the globe.

- Several internet based survey vendors offer the chance to create and manage online surveys at extremely low costs. They also automatically tabulate the results by breakout demographics. You can download the results to perform additional analysis in Excel and other common office software systems.

Your assessment should provide users with a list of the tasks they should be able to complete using your current or planned document management system. These features are what your users will depend on in order to complete their work.

Next, as depicted in the illustration below, you will want to learn several things about each feature.

- **How important is the feature to your users?** Is it extremely important to the way they do their work, or is nice to have but something they can live happily without?
- **How satisfied are they with the feature?** Does it fully meet their needs, or is it a good idea that is limited or poorly designed and thus not that helpful?
- **How proficient are they at using the feature?** This is very important because you may learn that a feature is very important and may have the potential to meet the need, but too many users feel they are only moderately equipped (or less) to use it the way it was designed to be used. If you can pinpoint areas where training will make the difference between success and failure of the system, you have the chance to turn things around quickly and inexpensively.

Assessing Utilization II

Assessing Current Utilization

Develop data on several dimensions at one time to pinpoint problems most accurately.



| Please provide your assessment of each of the following | How important is each of these capabilities to the way you want to work? | | | | | | | How satisfied are you with the current technology resources in the Law Department? | | | | | | | What level of proficiency do you have in using the current resources in the Department? | | |
|---|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|--------------------------|--------------------------|
| | Low | | Moderate | | | High | | Low | | Moderate | | | High | | Low | Moderate | Expert |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | | |
| Ability to provide business clients and company personnel with secure and restricted on-line access to specific document collections related to their matters | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The companion toolkit resource, “Sample Document Management Needs and Priorities Survey” follows the illustration above and provides you with a starting point. You can add or subtract document management features in the left most column of the survey.

- If you have purchased your systems from one or more vendors, you may want to ask the vendor for a list of their key features and capabilities, and modify the survey to reflect this list.

To verify that your final draft includes all that it should, ask five users to complete the survey on a pilot basis before rolling it out to all your users. You are likely to learn about improvements that will make a critical difference in the quality of results you get back.

If you are surveying your users before acquiring a document management system, you may still want to keep the middle column that asks about “satisfaction with the current technology” to learn whether people are successfully using the features in Word or the case management system so well that they don’t really need a more advanced system.

Uses of the Data

- If you are planning on acquiring a dedicated system, the data will enable you to prioritize

departmental needs and share this priority list with potential vendors. By knowing what the highly ranked priorities are, you can focus your attention during the system review phase to determine how well the potential new systems address your users' needs.

- By breaking out the data by practice groups within the law department, you can identify the differences in users' needs that will come up when you deploy the system. This breakout data will help you determine what trade-offs are acceptable in a new system and which are going to be a problem. For example, some practice groups will see law firm access as essential and others will see it as much less important.
- In preparing the documentation to justify the expense of the new system, the user survey will provide you with quantified results to demonstrate that such a system is really needed by the department. Those in IT and Finance conducting the review of your needs will find this data to be very persuasive.
- If you already have a system, you may also have a limited budget for customization. With an understanding of priorities and user satisfaction, you can focus this budget on system tailoring that will make the greatest difference to users.
- As noted above, you will be able to pinpoint where more training can make a critical difference in helping users get the value from the system that you intended. Even a brief training session focused on the right topics can make a huge difference in the acceptance and value of the system.