

# **BERCHEM MOSES PC** **CASE STUDY**



# Planning & Preparation are the Keys to a Successful Software Transition

## Background

Berchem Moses was founded in 1933 as a Connecticut general practice law firm. The firm has nearly 40 attorneys and 60 staff handling cases in more than a dozen practice areas and serves clients throughout the state. Many clients have maintained a relationship with Berchem Moses for decades based on the firm's continued execution of dedicated legal representation, personal and responsive client service, and cost-effective legal solutions.

For over a decade, Berchem Moses relied on Worldox for its Document Management solution. While Worldox had served the firm well, issues arose as the firm expanded and moved more of its practice to the cloud. John Krouzil, the Firm Administrator, and Josh Singer, the firm's IT manager, evaluated their options and ultimately made the decision to deploy NetDocuments.

The project required careful planning to minimize downtime and accommodate a substantial migration of two million documents stored in four 'electronic cabinets,' with one of those cabinets containing 1.6 million documents alone. They knew they needed both the expertise and the additional bandwidth of an outside resource to help them move the project to a successful conclusion.



## Choosing the Right Partner

Based on a previous engagement, the firm selected Circle Management Group's (CMG) Partner, Kelly Plunkett, to manage the transition.

The firm felt confident working with CMG would be a positive experience.

“ Electing to work with CMG was an easy decision based on its alignment with many notable industry players and their track record of success. ”

JOHN STATED

“ We reviewed the complete project and the nuances of what we were looking to do, and they were great to deal with, so we didn't have to shop around for a consultant. ”



## Blueprints of Brilliance—Planning the Path to Success

With the project given the green light, a team from the firm was assembled consisting of a senior partner, firm administrator, IT director, billing manager, paralegal, and two legal assistants. Additional firm staff were engaged to weigh in on specific aspects of the software as needed. Kelly Plunkett led the project, and she was aided by Laura Kennedy, CEO, and additional members from CMG as needed for training and support.

As with most law firms, a lot was happening at the time. Other projects and activities were underway, so a cadence of active connection was established to meet weekly and additionally as needed.

Several meetings and discussions took place to plan the transition with Berchem Moses' IT manager running point. A schedule was established spanning a pretty fast-paced two months from the project's start to go live, as the firm didn't want it to linger and wanted to stay ahead of summertime vacation schedules. All the details were finalized in April, and late June was selected for the cutover.



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During the planning phase, the team determined the particular items to bring from Worldox and how they would match up with NetDocuments.

“ One of the potential obstacles involved a particular folder, part of the system yet not part of the system, an old library/legacy file identified as something that would need to be moved over. ”

JOHN SAID

“ There were also new details to address, such as a numbering change from Worldox to NetDocuments, which was easily straightened out and supported by creating dual searching to find documents by old or new numbers. Training played a key role in that aspect to help the firm’s staff. There were a few other minor hurdles, but nothing where CMG didn’t swiftly find a solution. ”

For example, at one point, a mapping issue occurred during the transition, preventing some documents from migrating. Kelly and the CMG team fixed the issue quickly, rendering the situation of little concern.

Integration with the firm’s billing software was also set up so that when a matter is created in billing, a folder is automatically opened in NetDocuments, and subsequent folders are opened for successive matters.



## Time to Move

NetDocuments recommends a 6-day transition window to get every aspect of the data migration solidified, upload new documents, and conduct testing and quality control checks. Due to the firm's activity levels, that timeline was not viable to support its working processes. To solve this, John suggested establishing an additional server; CMG assessed the idea, determining it would successfully provide the firm with full access to live documents during the transition.

“ Nobody lost anything, nothing went wrong, and we still had access to everything. ”

JOHN EMPHASIZED

“ We were never locked out, and all documents changed over the six days were migrated once NetDocuments was live. ”

“The attorneys were hesitant at first, but it turned out to be a great process to bring everything over and eliminate stress. There was initial concern that attorneys and staff might improperly save documents during the transition or forget a document was saved to a ‘My Documents’ folder or a specific drive. There was no way an extended period without access would work, so CMG’s interim solution was exactly what we needed for everyone to continue working and serving our clients.”



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Training is critical to the success of any software implementation/migration, and the need is heightened when users have to learn how to execute familiar everyday tasks while moving from an existing platform. To ensure success, CMG scheduled several one-hour training sessions over two days, and everyone from the firm signed up. The training was also recorded and made available for anyone who had to miss a class or to watch as a refresher.

CMG was readily available to the firm to ensure a smooth transition, providing resources during the go-live process.

“ That was especially helpful because some of the staff had trained the day before we changed over, and even for people trained the day of the changeover, if they were having problems, they could just log in, and the CMG team was readily available to help, which was a fantastic idea. ”

JOHN ADDED

“ Kelly was fantastic, and CMG’s trainers answered everyone’s questions. The trainers were excellent and concise; they knew NetDocuments very well. ”

Follow-up training sessions were also scheduled a few weeks later to address any questions that arose once users had some time working with NetDocuments.

## Conclusion

As planned, Berchem Moses went live with NetDocuments in June of 2023, and all users are happier overall with the new software.

Thanks to careful planning and active project management, no particular or significant hurdles arose that needed to be addressed.

“ Kelly was amazing. She had everything planned out, and we didn't really deviate from her plan. We didn't encounter any major issues, and the project went smoother than I thought it would. Sometimes, when you change software, it's mostly putting out fires, but this went especially well. ”

JOHN SAID

“ We were delighted and lucky to have had the opportunity to work with CMG. ”

