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# 10 REASONS why you should switch to a **Microsoft 365** based DMS!

# So, why should you consider Microsoft 365 for your content?



## 1 Cost savings

Often existing Microsoft 365 (E3 or E5) licenses provide SharePoint as a Document Management System with no additional costs. A significant amount of storage is available by default (1TB + 10GB per licensed user) and if you need more, you are not paying an excessive amount for extra storage. Levering the storage capacity that is available as part of your subscription will bring a significant cost saving comparing to how typical DMS vendors charge for extra storage.

Furthermore, Microsoft 365 licenses come with a range of applications and out-of-the-box integrations, which means less additions are needed to facilitate extra functions such as a recycle bin, archiving functions, (custom) reports or external collaboration.



## 2 Teams Documents

Most organisations use Microsoft Teams as a platform for communication and collaboration these days. However, they struggle to synchronise content between legacy document repositories and Teams. By using Microsoft Teams and SharePoint as a DMS, you can avoid these content fragmentation challenges.



## 3 Increase Security

Microsoft 365 provides powerful security solutions such as Azure Information Protection (AIP), conditional access and retention labels on top of content that lives within the Microsoft 365 platform. Avoid storing content in unmanaged repositories, since this might cause a security risk. With the integrated platform, security is less of a concern.



## 4 Simplify Integration

Microsoft 365 provides out-of-the-box integrations with its own applications. As part of the Power Platform (Flow), additional applications can be easily integrated using standard connectors. This simplifies communication with third-party solutions, such as e-signing applications and allow you to connect all the tools and applications easily.



## 5 Reduce Maintenance

Microsoft 365 and its partners manage and maintain standard product integrations and Flow Connectors. You will significantly reduce maintenance and testing activities for custom integrations by using standard connectors and flows instead of custom programmed integrations.

## 6 Ease New Projects

As a result, future projects will be much easier. This is because most of the tools are already available in your platform and can be evaluated as potential basis for any future business requests.

There are many tools available for every new project you undertake, whether it be to build a portal or to build certain functionalities or integrations. You can pick from a variety of applications and tools for each upcoming project, which will most likely help you accelerate the realisation of your needs.

## 7 Client Demand

Enterprise organisations will demand a more integrated and secure collaboration with outside counsel.

Legal departments are already used to collaborating with their internal colleagues via the Microsoft 365 platform. Additionally, their customers (business users) are served on a platform they are already familiar with, which simplifies their transition to new solutions

We are seeing that more and more legal departments ask law firms for better and more integrated ways of communicating, exchanging information, and handling tasks.

## 8 Maximum Innovation

Microsoft invests heavily year after year in making sure Microsoft 365 provides the most innovative applications and solutions as part of the platform. These applications and solutions are used and supported by a massive global community that helps to drive the support and the roadmap for all Microsoft products in the suite.

Microsoft has an enormous innovation budget and standalone DM providers cannot compete with that level of investment and innovation. All these extras and new features can be examined as part of new projects or improvements.

## 9 Others have done it

You might be told that no one has ever done this successfully, which is simply not true! Many organisations from various market sectors and sizes have switched from legacy DMS systems to a modern, Microsoft 365 based solution. Furthermore, more case studies from larger law firms will be coming shortly.

Some sample case-studies showing organisations from different types have successfully replaced their legacy DMS with a Microsoft 365 based alternative.

**ArmstrongWatson**  
...we're with you

Type: Professional Services  
Source: iManage Work

**Boels  
Zanders  
Advocaten**

Type: Law Firm  
Source: iManage Work

  
**Hydro**

Type: Legal Department  
Source: iManage Work

## 10 Standard methodology

If you are considering migrating your DMS content to the cloud DMS then Microsoft 365 should be considered. So, what would a migration look like? Firstly remember, you are migrating to your tenancy so it remains your data.

We have developed a standard proven methodology and toolkit to help you replace your legacy DMS and move over smoothly to a Microsoft 365 based solution.

So, why should you not consider Microsoft 365 for your DMS strategy?

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**1. Migration Checklist** – First of all, we do an intake to fully understand your source system. This can be a structured DMS like iManage, NetDocuments or a file system.

Either way, we need to understand the logic behind the source. What level of folders reflect a matter or a client for example.

**2. Mapping & Rules** – After that, we can identify the rules and mappings. We will typically read directly from the source system (database and filestore, or via API connection), so we would never adjust or update your existing DMS. It will remain untouched until you are comfortable to switch over and eventually turn it off.

**3. Test Migration** – We typically do a test migration trying to cover data from all the types of work, all the practice areas and all the different types of workspaces. We then typically have a broad migrated data set available for examination during the test phase of the project.

**4. Bulk Migration** – Are you happy with the test migration? Then we move on with the bulk migration. We migrate the history documents (often millions of documents) over to Microsoft 365, using Azure Storage for maximum throughput and performance.

**5. Delta Migration** – Once bulk migrations has finished. We do the delta migration, to detect and copy over the differences since the last (bulk) migration. This can be done once, if you prefer to go at once with all users or multiple times if you prefer to have the go-live in groups.

**6. Reporting & Fix** - While our migration software has a very high success rate, there will always be exceptions, like that one document that cannot be copied. We would report on those and fix these manually, so we make sure nothing is left behind.

**7. Optimise Documents** – Lastly, we can improve documents which can be done for example by adding OCR-text layers, to improve search results. Or by adding additional metadata such as knowledge tags, to provide extra functionality to end-users.

Have a look at **Custodian** powered by **Intapp Collaboration & Content**



**A UK firm  
with 500  
users goes  
live in July!**

Transform Data are a company that was formed in 2014 with a focus dedicated to delivering content and matter management solutions on the Microsoft 365 platform. The senior management team are made up of members who had a rich history in the provision of iManage in Europe from 2002 to 2017, so already had a deep understanding of Law Firm, In House and Professional Services content management requirements. We saw the early uptake of Microsoft 365 for office productivity and understood that the platform would only mature over the coming years. In conjunction with the Microsoft 365 software provider, Repstor, we assisted in delivering complete matter management functionality to the legal and professional service market.

Over the last 8 years, we saw our solution start in small In-House departments and smaller law firms with no DMS history. As the Microsoft 365 stack matured, so did our client base with multinational legal departments, larger law firms and other professional service organisations adopting Microsoft 365 as a strategy, along with our Custodian Suite to provide specific matter management functionality. While our first iManage to Custodian migration was completed in 2015, we have now reached a point that we see many firms adopting Microsoft 365 as a strategy and many of them are actively migrating from iManage on-prem and cloud to Microsoft 365 and Custodian.

We feel very qualified to offer our list of the 10 big drivers on why your firm should seriously consider Microsoft 365 as the platform for your document and e-mail management. However, there are two overarching drivers. Firstly, Repstor was acquired by Intapp in 2021 giving it a new global reach and a handsome R&D budget to expand the future roadmap even further. Secondly, the professional services community as always required partners that can act as support and trusted advisors, and we feel we meet those criteria after 7 years' experience delivering Intapp Documents with our Custodian Suite, that will ensure it meets your market segment requirements.

