

# FileTrail®

Trail Blazer:  **NELSON  
MULLINS**

## Modernizing IG Policy Management and Disposition

With 25 offices and more than 750 lawyers, Am Law 100 firm Nelson Mullins needed a modern solution to enable new levels of information governance (IG) and enhance records management.

After a rigorous evaluation process, Nelson Mullins selected **FileTrail GPS Records Manager** to replace LegalKEY in 2017. The firm then purchased **FileTrail GPS Policy Manager** to manage electronic documents in NetDocuments. The firm has achieved significant success with FileTrail GPS, including the disposition of 1.5 million electronic documents.



John Churchill  
Records Department Manager

### Making the Right Choice

"Our team did a lot of research to find a records management solution to replace LegalKEY, which isn't fully supported anymore. We needed to move to something that was more dynamic and specifically designed to meet the needs of a large law firm. FileTrail really fit the bill.... it provides the flexibility, continual development, software integrations and advanced reporting features we need to properly manage our records program going forward."



David Worth  
Chief Information Officer

### Netting Real Results with NetDocuments

"After evaluating numerous solutions, we kept coming back to FileTrail. In addition to its focus on law firms, what really made it stand out from the competition was its integration with NetDocuments. While other records management solutions were only in the process of developing that functionality, FileTrail has a longtime relationship with NetDocuments. That integration was its biggest selling point."

[www.FileTrail.com](http://www.FileTrail.com)





Customer Perspective: Chief Information Officer

## David Worth on the firm's significant FileTrail ROI:

Timely disposition of electronic records is a critical task that many firms haven't prioritized enough, in part because of the effort required. At Nelson Mullins, we decided to take disposition of information assets in our DMS head on, with an eye to reducing ongoing costs and risks associated with keeping records longer than needed.

Thanks to FileTrail, we were able to conduct a thorough review of the electronic records we held in NetDocuments, and identified 1.5 million documents for disposition. Automated workflows made the review process fast and efficient. Our partners appreciated how easy it was for them to review and approve documents for disposition, and escalate decisions requiring further consideration.

The transparency and intuitiveness of FileTrail GPS, the visibility it provides across all electronic and physical information repositories, and the fact that it automatically captures a record of all activity and approvals, make it an extremely valuable tool for any organization that is serious about information governance, compliance and long-term cost control.





Customer Perspective: Records Department Manager

## John Churchill on Nelson Mullin's experience with FileTrail:

The transition from LegalKEY to FileTrail was very smooth, despite some trepidation initially. Our records staff and users have adapted well. We've had a very positive experience with FileTrail since implementation. The help desk has been great, and FileTrail has been very supportive in listening to our ideas, particularly with regard to retention.

FileTrail is sleek and streamlined. It's web-based and more user-friendly, more visual and better organized than LegalKEY. Searching is certainly a lot easier and more dynamic, and navigation is a lot smoother. Working with 'carts' was new to us — it's more of an Amazon-like shopping experience — but it also feels more modern.

FileTrail is all-encompassing, allowing us to manage physical as well as electronic records thanks to the integration with NetDocuments. We appreciate its modern cloud-based approach. On the IT side, it's helped to reduce costs in infrastructure management.

The integration between FileTrail and NetDocuments has also helped us from a mobility standpoint. Our records staff can walk around with scanners and tablets and update the system without docking. With FileTrail, we now have reporting capabilities we didn't have with LegalKEY.

The training that our records staff received from InOutsource — in person and through webinar sessions — really helped. Initially we focused on getting a few people in our department proficient in FileTrail behind the scenes. Once we went live, we had records team members walking the floor to assist staff. Our IT department also put together videos and slides on how to do things in FileTrail instead of LegalKEY. People got used to FileTrail very quickly.