



## **SPHERE's Depth of Automation Powers Smart Data Governance for DMS Migration of Top 100 Global Law Firm**

### **Primary Use Case Themes:**

- Resolving Unstructured Data Security Issues for Matter Data
- Document Management System (DMS) Migration
- Data Governance Target Operating Model

### **Summary of Solution:**

A Top 100 Global law firm is looking to leverage SPHERE's analytics-driven approach to resolve its unstructured data as it migrates to a new DMS. SPHERE was able to power a data governance target operating model that works for the firm's current systems and groups, creating added value and security throughout the course of the DMS migration.

The driving force behind this initiative was resolving visibility and management of unstructured data across the law firm's internal networks and folders, including matter data ownership and access.

### **Client Snapshot:**

Joined SPHERE In: 2018  
Amount of Open Folders: 7.3 million  
Number of Folders that Need to be Managed: 21 million

## **Why SPHERE?**

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### **The Problem Statement**

The firm needed to assess its unstructured data and overall network environments for legal data security. With its existing DMS being used only about half of the time, sensitive case files and billable hours worked on those files were put at risk.

## Client's Existing Workflow

The client's existing workflow was haphazard. It had a DMS in place and a general design of what it wanted employees to do in the context of data access and management, but the structure wasn't in place to make it a reality. Their unstructured data was otherwise largely unmanaged -- employees were left to create folders and manage them on their own. In some cases, certain practices only used the arbitrary file system instead of the DMS. Not only did this pose a threat for a data breach, but it created issues for billing hours worked on documents in and out of the DMS.

*48% of law firms had their data security practices audited by at least one corporate client in the past year - Logicforce*

## Client's Desired Workflow

The firm needed to install a target operating model that works for its current systems, practice groups and business staff. In order to deliver a solid governance practice, we lead a series of workshops with the firm's relevant stakeholders covering specific topics related to data governance. During the course of each session, we discussed the impact of a given data issue toward the organization, as well as the considerations that we have to think through when designing this structure and policies. At the outcome, we developed a roadmap for how the firm can implement a solid governance practice for its unstructured data so that it is aligned with the firm's DMS strategy, servicing and workflow strategies, all its retention policies, and the way it conducts business.

*"Data security is especially important for legal firms given the sensitive nature of their business. Identifying risks and implementing the right controls around this data is key to protect against new threats and client pressures." – Doug Bayne, Director of Professional Services*

To fully understand the path to migrating to a new DMS, SPHERE applied their analytics approach to the way the folders were created and organized and aligned each folder to a matter or business services group. This allowed the migration team to move the data to the appropriate area within the DMS and avoid moving stale data.

## Benefits

The firm wanted to establish a sustainable data governance practice that enables it to understand and quantify its data, both in the course of its DMS migration and in the long-term. The firm also wanted to be able to understand and report on what data it has, how much of it does it needed to migrate and how, how long it was going to take, and what are the associated security issues. By providing an in-depth analysis of the current environment we were able to provide a migration path to the DMS, ensure a pristine environment that included the ability to maintain the security and provide a reporting framework to ensure their data governance practices are in check.

## Why SPHERE?

Our analytics-driven approach to achieve a deep understanding of unstructured data is unparalleled in the space. Our competitors don't have the depth of automation that we have -- from ownership determination and access management to data classification. Working with the law firm's DMS experts, we were able to find and define data owners through automation -- a process which usually involves interviewing employees to manually validate 20M+ folders.