



chestnut cambronne  
ATTORNEYS AT LAW

Services: Document Management

Industry: Legal

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## Chestnut Cambronne Streamlines Document and Email Management with NetDocuments and Element Technologies

Whether it's advocating for individuals or institutional investors in class actions, representing businesses, prosecuting crimes on behalf of local government, providing guidance in estate or elder planning for individuals or families, assisting those who have been injured, or representing individuals in divorce proceedings, the attorneys at Chestnut Cambronne offer efficient and expert legal representation to meet their clients' needs. The Minneapolis-based firm is equally forward-thinking and proactive when it comes to utilizing technology to streamline processes, increase productivity, and seek maximum efficiency for staff and clients.

It is this drive for superior client service that necessitated the firm's move to a commercial document management solution (DMS), specifically NetDocuments' cloud-based platform, at the beginning of 2023. Previously, Chestnut Cambronne had a network server drive and a basic Windows folder structure in place, and attorneys maintained individual client folders for their own cases. This made collaboration on cases extremely difficult and cumbersome, and finding files, specific documents, and content near to impossible. Instrumental in the firm's DMS selection, implementation, and adoption were IT Manager Jerry Hsiao and firm partners and shareholders Bryan Bleichner and Jeffrey Bores, who explained,

“It seemed a bit like a black hole for us to find the files we needed, more akin to small firm challenges versus the mid-market enterprise Chestnut Cambronne has grown into.” In addition, the firm experienced email management issues specific to archiving and storing emails as well as locating accurate correspondence in a timely manner.

Having made the move to the cloud over a decade ago, first with the virtualization of servers and subsequent replacement of IT hardware, and then adopting Office 365, the firm was naturally drawn to cloud document and email management technology, and very familiar with what a cloud-only platform like NetDocuments could and has delivered to thousands of law firms with similar DMS challenges.

In the initial stages of their search for a new DMS, Bleichner reached out to the legal community for feedback and insights. “I am heavily involved in plaintiff class action work which includes exposure to a fair amount of technology. As part of the vetting process, I reached out to some of the tech-minded folks at other law firms, both in-state and outside of Minnesota, to gauge their experience with various platforms. Time and time again, the conversations kept coming back to NetDocuments. Specifically, NetDocuments users at other firms would tell us how much they liked the ‘Google-like’ search capabilities, a godsend for tech adverse users, and how easily and proficiently NetDocuments managed email.”

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- Bryan Bleichner, Partner & Shareholder  
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**Given Chestnut Cambronne’s specialization in class action data privacy cases and their representation of consumers and banks handling millions of sensitive and secure documents, Bleichner and his colleagues paid particular attention to DMS security.** Bleichner added: “After taking a deep dive into NetDocuments security and governance models, we took comfort in the system’s robust encryption and other security features.”

## The Right Technology Partner

The firm followed similar rigor when evaluating implementation partners tasked with data conversion and

mapping, system implementation, and NetDocuments user training. According to Bleichner, vetting potential providers was absolutely essential: “I come from a world where I must vet everything. I have a duty to my clients. And similarly, I applied that here. I feel like I have a fiduciary duty and so we evaluated various implementation providers including Element.”

According to Bleichner, Bores, and Hsiao, beyond competitive pricing, Element’s experience working with law firms was extensive and impressive. Bleichner added: “I compare it to the medical world ... the biggest indicator of a surgeon’s success is their experience and track record with a particular surgery, and how many times have they done that?! We took a similar approach with Element -- they have done these implementations hundreds of times with law firms similar to us in terms of size, practice areas, and personalities. The overwhelmingly positive feedback we received from our peers and the legal community regarding Element played a significant role in our decision-making process. Element has been extremely responsive from day one, and a good group of folks with whom we really clicked.”



Bores added: **“Element’s vast law firm experience, in particular with mid-size NetDocuments implementations, was invaluable. They know what works, what doesn’t work, and helped guide us to make the best decisions to have a successful implementation as well as a successful user experience.”**

### Culture Change

The firm faced a substantial cultural challenge in achieving DMS unity. Despite various attempts over the years to implement procedures, standardize documents, file naming, and designate consistent storage locations, it had become a mishmash that hindered the efficient management and retrieval of documents. With the firm’s continuous growth, the problem intensified.

Bores shared that the firm dedicated a significant time upfront as part of the implementation to design an

environment focused on establishing uniform processes. “You have to think through what templates for various types of case files and matter types need to look like. A litigation file is obviously different than a real estate file and how the documents should look within folders, and be structured, was an important part of our implementation. Plus, we pulled in a wide variety of practice groups, not just lawyers, but paralegals and legal administrative assistants, some of whom work in multiple areas, and engaged them in early conversations about how folders should be structured.”

Bores added: “Looking back, the only way we were going to successfully do this was with collective buy-in. And now, about six months after our January ‘go-live,’ we are at about 98% user adoption and satisfaction, which is such a stark difference from how things previously ran. As one of our internal project managers said, ‘After you get past the first five days, people are not even going to remember how they did it in the past.’ There is a lot of truth to that. The hard work that we put in on the front end in collaboration with

Element and their guidance and legal-specific expertise, paid off in spades once we ‘flipped the switch’ with NetDocuments.”

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### Practice (aka Training) Makes Perfect

A few weeks before go-live, Element offered three levels of firm-wide, mandatory NetDocuments training including “Introduction to NetDocuments,” tips and tricks, as well as specific training for system administrators and project managers. Once the firm was up and running, Element also provided onsite training to troubleshoot and support Chestnut Cambronne’s team guaranteeing a smooth and painless transition for its 70+ employees.

“The user base has equally played a vital role in adoption and increasing proficiency with the new DMS. “Since we involved a variety of practice groups and different roles from the beginning, once NetDocuments was ‘on,’ everyone worked together and shared training insights and new features or functions as they discover them. We want to keep this momentum going and are looking at doing our own tips and tricks sessions to keep the learning and knowledge sharing alive,” shared Bleichner.

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“Once NetDocuments was live and I was sitting in my home office accessing documents, it was so quick, efficient, and responsive that it caught me off guard. It’s satisfying to not only get what you pay for but be



able to use the platform as it was previously showcased during demos and vendor meetings,” concluded Bleichner.

With the partnership of an industry-leading cloud platform like NetDocuments and a reputable Managed IT and legal technology specialist like Element, Chestnut Cambronne is strategically positioned to provide clients exceptional service now and well into the future.

### About Element

Element is an award-winning NetDocuments platinum-level partner recognized as SML Partner of the Year in 2021 and Corporate Legal Partner of the Year in 2022. The Element team, with over 200 successful migrations and 60+ years of hands-on legal tech experience, helps organizations across the spectrum of NetDocuments DMS needs including selection, design, data migration, application integration, and user training. In addition, Element provides the legal community with Managed IT services, cybersecurity, and the implementation of top-tier practice management solutions.



### About Chestnut Cambronne

The firm has extensive and unique experience in class action and civil litigation; business representation; tax, estate, and elder law planning; real estate law and litigation; family, criminal, and personal injury law; townhome and condominium law; arbitration and mediation; copyright and trademark law; liquor law; maritime law; and government relations. Whether representing individuals or institutional investors in class actions, representing businesses, prosecuting crimes for local government, assisting an individual or family with estate or elder planning, helping an injured person, representing an individual in a divorce, or advocating for clients at the legislature, Chestnut Cambronne's attorneys represent their clients efficiently and expertly.