3 Document Retention and Storage Challenges for Attorneys

document retention

Do you know where your data is?

A recent report from Gartner found that most law firms are *missing almost half their data*. *Eighty percent* of the intellectual property a firm handles is communicated with or stored via email.

What does this mean?

Attorneys in your firm are losing as much as six hours a week to [document management](#).

Why document management is so challenging

[An IDC whitepaper](#) found knowledge workers wasted 11.2 hours a week sorting through document management (DMS) challenges. This whitepaper calculated the loss at $19,732 per knowledge worker, per year. A 21.3 percent loss in the firm's total productivity.

What's going on here?

Why is document management so challenging? Are there any storage or retention challenges making this difficult for attorneys?

As a matter of fact, there are.

1. Unable to find the documents you need

When documents are lost, there are typically no naming conventions or systematic processes in place. In a truly disorganized firm, each attorney creates their own system for naming files. As the IDC whitepaper shows, individual attorneys or paralegals lose approximately 2.3 three hours a week searching for files.

Searching, *not finding*.

When these documents aren't found, firms typically waste another two hours requesting or tracking down files that are lost.

2. Recreating lost documents due to poor retention or version control

According to AIIM, 81 percent of law firms struggle with access – sharing information across multiple platforms. Most firms are struggling to find the documents they need.

What does this mean?

When documents are difficult to find, your team *recreates* them. When your team needs mobile access but that access isn't available, they *ask someone else* to recreate them.

This complicates things further.

Which version is required for your client's matter? Who has the right version? Is it you? Are you *sure* this is the right version? Do you have access to the right version?

See the problem?

An [AIIM 2015 study](#) found *25 percent* of knowledge workers failed to comply with document management and retention policies. Non-compliance means retention

and version control becomes extraordinarily difficult.

3. Documents have poor permissions and security

Your staff is sophisticated.

They're aware of the benefits that come with cloud computing. They're able to adapt to your firm's document management system of choice. They're familiar with cloud storage and they store their personal data in the cloud.

This is dangerous behavior.

A recent study found 70 percent of IT managers surveyed "*know or believe that users have business data in their own personal file-sharing accounts*." Often times this isn't malicious, it's simply due to poor document management protocols.

This is the issue.

The ABA's Model Rules of Professional Conduct 1.6: Confidentiality of Information **(c)** A lawyer shall make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, information relating to the representation of a client.

Files require permissions.

Your document management system should **easily** confirm or deny user access, something many organizations struggle to do.

Document retention shouldn't be challenging

But it is for many firms.

Missing data, poor document retention policies, no version control. These are the issues that stem from a poor document management system.

Most firms are *missing half their data.*

They're not sure what they have, where to find it or who has access to it. Document retention and storage doesn't have to be difficult. It *does* need to be precise.

Most firms aren't as precise as they could be.

As a result, they're losing 11.2 hours per week or $19,732 per employee, per year. It's an expensive decrease in productivity. How do you fix these problems? In my next article, we'll discuss the solution to these common document management problems.

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