



## Element Express Your Affordable, Fast, and Efficient Pathway to NetDocuments

In pursuit of migrating from the Worldox document management system (DMS) to the cloud-based NetDocuments platform, law firms and other organizations often find themselves struggling with the cost, extensive project scope, and extended timelines associated with implementation and user training.

To solve this very problem, Element Technologies developed Element Express, a new data migration and implementation tool.

Element, a NetDocuments Platinum Partner, has performed hundreds of implementations and migrations from a variety of document management systems including Worldox. Chris Dunsford, document solutions manager, leads an accomplished team of application engineers, solution architects, developers, project managers, trainers, and support staff all focused on providing clients with a superior DMS services experience.

“With the acquisition of Worldox by NetDocuments, we recognized the need for a seamless and cost-effective transition for existing customers. In response, our developers created a tool specifically designed to migrate organizations from the Worldox platform to NetDocuments,” stated Dunsford.

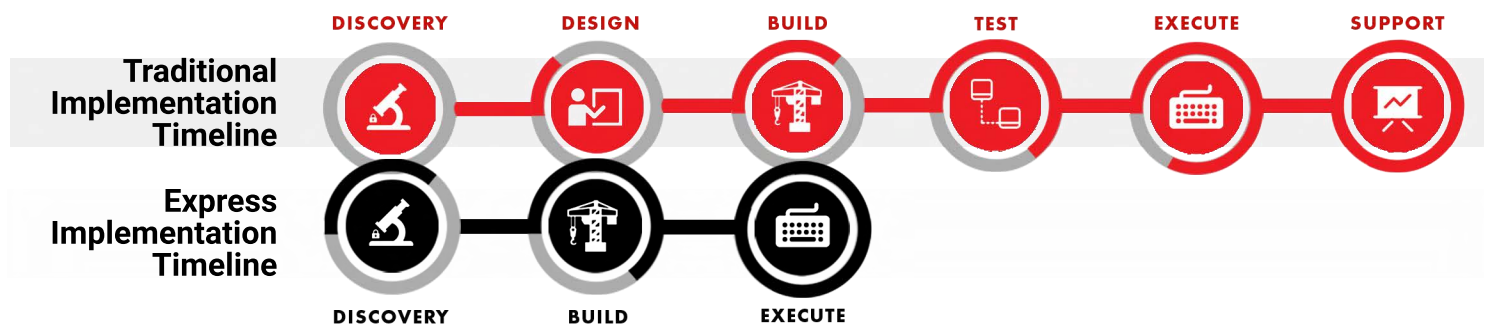
Element Express is the perfect solution for clients looking for a fast, lower-priced migration that mirrors their existing Worldox design. Traditional migrations can be both expensive and time-consuming. The goal of Express was to eliminate the burdensome commitment of time and cost by providing a tool that facilitates the transition for Worldox clients to the NetDocuments platform.

“Imagine Element Express as a reliable forklift, efficiently transporting a pallet of data from one platform to another,” added Dunsford.

The Element team foresaw the need for user adoption as part of the “Express Experience” and included comprehensive training as part of the implementation package to ensure users can effectively leverage the NetDocuments platform right from the start.



Family Investment Center’s move to NetDocuments from Worldox was a central part of their ongoing ‘cloud first’ tech investment strategy. Having used Worldox for well over a decade, the process of finding an implementation partner was eye-opening, especially regarding costs and effort in migrating the company’s data. Led by Tamara Sterling, Chief Compliance and Information Officer and Associate Advisor, Family Investment Center, a St. Joseph, Missouri-based commission-free investment advisory firm, undertook a thorough migration team review involving several third-party managed IT service providers. “After meeting with a provider whose project proposal called for an 8-week long, complicated data migration and implementation plan, and bare minimum user training, as well as an exorbitant fee schedule, we talked with Element Technologies and found out about the Element Express data migration and integration tool. What got our attention right away was that the Element Express method would mirror our



our data and folder structure in Worldox. We thought that made sense considering our employees would be familiar with the new structure and hopefully hit the ground running.”

Family Investment Center chose Element Technologies and its Element Express tool in large part due to the condensed implementation time frame, **almost 40% shorter than alternative proposals, a substantial comparative cost saving of 73%, and the inclusion of NetDocuments user and onboarding training** through Element University and its NetDocuments certified training team.

Foster Buick, an Illinois-based firm specializing in Municipal Law, Estate Planning, Real Estate, Banking & Corporate Law, Trust Administration, and Zoning & Land Use, among other practice areas, was also looking for implementation and data migration expertise as part of their recent Worldox to NetDocuments DMS switch.

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-Tamara Sterling, Family Investment Center

“Based on quotes and proposals from various IT providers, Element Technologies and the Element Express solution designed to handle our end-to-end migration to NetDocuments was the best option,” stated Keith Foster, Foster Buick’s Managing Partner, and head of all things IT. “Overall, set up was easy and everything was done via Element Express in the background. The inclusion of user training was extremely helpful, especially since we could go back to pre-recorded tutorials post-go-live to help our users when they need it. Also of note, was the integration Element engineered with our PracticeMaster legal practice management system, which is where we start our day.”

## 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.

350+  
NetDocuments Migrations

70+  
Express Migrations

23  
DMS Team Members