CAPENSYS

SJ STEPTOE & JOHNSON PLLC

Rollout Case Study

UPGRADING FROM OPENTEXT TO IMANAGE

How Steptoe and Capensys partnered to deploy a major change in how people work and how the firm motivated and trained users to perform efficiently.

ROLLOUT GOALS

- Increase usage of the document management system over storing documents in email

- Manage documents and email more efficiently and intuitively

- Allow users to work remotely on any device

- Enable users to do more from inside the familiar Office and Outlook interfaces

OVERVIEW

The Steptoe/Capensys Training Team rolled out Work 10, Office 365, and Nuance to 600 users in 14 offices across 6 states. The team identified key business and user goals, validated project objectives, and formulated a training timeline. Capensys created a comprehensive training plan with office-by-office resource allocations, project activities with owners, and risks. Capensys then managed the overall training plan.

> We worked with Capensys to help move our firm to the iManage cloud platform. We found Capensys to be very attentive to our training needs, flexible in their approach, and very knowledgeable of the subject.
>
> **Mark Combs, Chief Information Officer**

CHANGE MANAGEMENT

Challenge	Solution
Transition from OpenText to iManage	• Identified key migration goals • Addressed current DMS challenges • Communicated advantages of iManage • Provided tailored communications including Coming Soon! messages addressing timeline, training and support opportunities, and the benefits of the new DMS
Provide relevant/time-efficient training	• Conducted interviews to learn about offices/practice groups and corporate culture • Identified primary Personas (workflows) in the firm • Created relevant skills curriculum for each Persona

TRAINING AND SUPPORT

> **The material Capensys provided was first rate and the onsite support received high marks from our attorneys.**
> ~ Mark Combs, Chief Information Officer

Go-Live Training
A team of top-notch training professionals delivered dynamic and engaging training sessions both in person and remote. These experts in the field provided post go-live support with a focus on maximizing user adoption. Capensys held multiple train-the-trainer sessions and provided scenario-based training material, including trainer scripts, introductory PPT, Quick Reference Guides (QRGs), and Frequently Asked Questions (FAQs).

Go-Live Support
To ensure a smooth and efficient transition to the new desktop, each user was visited multiple times with deskside coaching sessions tailored to their iManage configuration to validate their understanding. Floor Support Checklists were submitted to the local Office Administrator for each user.

Go-Live Leadership Support
For the first week of the go-live, daily support team call-in "huddles" were held to identify local issues, review the Help Desk reports, discuss issues resolutions, and formulate action items.

Post Go-Live Support
Shortly after go-live, Capensys offered remote training sessions to all users, including mop-up rollout classes and targeted "deep dive" classes (15-45 mins.) based on Help Desk ticketing trends.

> **Capensys is customer service at its finest.**
> ~Toni G. Limbers, Mgr, Prof. & Staff Development