

Breaking free

Using technology to gain independence from the office

INTERVIEWED BY JAYNE GEST

Many employees in law firms, corporations, professional services organizations or other workplaces don't want to be tied down to the office or a desk. However, while they'd like to work anywhere — home, a hotel or even the beach — they don't want to compromise on performance or security.

Fortunately, a growing number of applications have mobile capacity, says David Cramer, manager of Business Development in Legal and Professional Services at Blue Technologies. It's part of the digital transformation that's providing better work-life balance and quality of life.

"Technology has advanced so that people can use a laptop or mobile device to do their job like they were in the office," he says.

Smart Business spoke with Cramer about how legal and professional services are attacking this pain point with technology.

How are document management systems becoming more mobile device friendly?

Many solutions are designed to be a cloud-ready, secure mobile application for people to access and organize their business content anywhere, any time and through any device. People can use them directly from a web browser, and they interface with common applications like Microsoft Outlook and Office, as well as Adobe Acrobat.

Program developers also are taking cues from Amazon, LinkedIn or Facebook. Most people have used a shopping or social media site without extensive training. They want their interfaces to have the same intuitive feel.

In the legal space, what are some common tools people now use from mobile devices?

Legal professionals often want to compare documents. It's not unusual to have 20 or

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30 versions going back and forth when parties negotiate the terms of a contract. Players in the legal vertical sell document comparison applications that can be used over a mobile device. While Microsoft Office can compare documents, it's not always accurate or robust.

Another tool, which can now be used via a mobile device, is software that deletes hidden metadata. If a document has been repurposed without cleaning the metadata, a savvy Microsoft Word user can see changes that the original party didn't want them to see. Applications that clean metadata may also have a smart-send feature. When someone is about to send an external document, it checks the email address. That way, the sender isn't sending something confidential to the wrong email account.

Where does security come into this?

Security measures like two-factor identification and mobile device management applications can ensure employees conduct their remote business transactions securely.

Secure file transfer also can be set up for mobile devices. These solutions tightly integrate with a document management system. If a document is too sensitive or large to send via email, the document can be uploaded to a secure cloud location. Then, a link can be sent to someone to either

download or view that document.

A secure collaboration space is another tool. It's similar to Dropbox, Box or Google Drive, but it's a secure space to collaborate with clients. When documents are put into that space, they are password protected, audited and tracked.

What do executives need to know about implementing these solutions?

Depending upon what a firm would like to do, it can move into working remotely in phases. For example, a corporation could start with the ability to do document comparison and metadata cleaning from mobile devices. Firms also may need to update or convert their document management solution to enable mobile capabilities.

Document management solutions require design to make the look and feel mesh with the workflows of business professionals. Somebody cannot click on a link, download software and run with it. There is a professional services component to implementing this software, and it's essential to have expert help designing the system. Depending on the existing technology, documents also may need to be moved from one repository to another in a document conversion. Although it's designed to be user-friendly and intuitive, some training and support are required. ●