

Is it time to level up your legal tech?

Take this 5-minute quiz to find out if your firm or legal team is ahead of the curve — or stuck in the past.

With the rapid rise of AI and constant innovation in legal technology, expectations are higher than ever for how smart, secure, and seamless your document management should be. This quiz dives into five key areas — AI, collaboration, security, search, and user experience — to help you assess the tools your team relies on every day.

Ready to see where you stand? Answer the questions below.

Integration

Consider your current legal document management system. Let's take a look at how well it integrates with the everyday tools your teams depend on – like email, Word, and collaboration platforms.

1. Can you work with your document management system right inside the tools you use every day – without needing to switch apps or interrupt your workflow?

Yes No Not Sure

2. Is your DMS connected to Outlook in a way that's built for the future (using Microsoft 365), or is it still relying on older methods that Microsoft is planning to phase out?

Yes No Not Sure

3. Do you have AI built into your document management system, or are you copying content into ChatGPT or another AI tool outside of your DMS?

Yes No Not Sure

4. Does your DMS enable seamless connections with other parts of your legal tech stack, like your practice management or billing software?

Yes No Not Sure

Collaboration

Let's look at how easily your lawyers can collaborate — both with colleagues internally and with third parties. How smooth is the experience when it comes to working together on documents?

1. Can multiple lawyers easily co-author in real time with the controls to restrict access when needed?

Yes No Not Sure

2. Can you collaborate on documents within Microsoft Teams without compromising data governance — ensuring access controls are preserved, sensitive work product stays secure in the DMS, and unnecessary copies aren't created across systems?

Yes No Not Sure

3. Does your DMS offer automated, customizable workflows that your whole team can use?

Yes No Not Sure

Automation

Let's explore how your organization is using AI-driven automation to streamline workflows and eliminate repetitive, manual tasks.

1. Can routine tasks like document creation and clause extraction be automated at scale within your DMS?

Yes No Not Sure

2. Can your DMS's AI tools adapt to your unique workflows — or are you stuck choosing from a predefined menu of limited use cases?

Yes No Not Sure

3. Does your DMS offer an AI assistant that goes beyond answering simple queries to delivering meaningful insights that support decision-making in legal workflows?

Yes No Not Sure

Document Discoverability

How easily can your lawyers find the documents and information they need — when they need it? Let's take a closer look at the effectiveness of your current search and organization tools.

1. Can you search by concept (semantic search), not just keywords? (e.g., a search for "non-compete agreement" would also surface results that mention "restrictive covenant," "employee can't work for competitors," etc.)

Yes No Not Sure

2. Does your DMS provide AI-generated answers rather than just links to documents?

Yes No Not Sure

3. Does your DMS provider integrate and optimize various search methods — such as metadata, full-text, and semantic search — to deliver a powerful, intelligent search experience for users?

Yes No Not Sure

Content Enrichment

Finally, let's examine how your DMS enhances documents with context.

1. Does your DMS support unlimited and dynamic metadata?

Yes No Not Sure

2. Are you using AI to enrich your content with auto-classification and auto-profiling?

Yes No Not Sure

3. Does your DMS make it easy to consistently and accurately apply your complete preferred taxonomy?

Yes No Not Sure

Turn the page for your results!

The Result

Let's see if it's time to level up your legal tech. How many questions did you answer "Yes" to?

0-8 "Yes" responses

You've Got Big Opportunities Ahead!

Based on your responses, it looks like there's a lot of room to level up your document management and legal tech approach. But don't worry — this is exactly where progress starts. Here are a few high-level recommendations to consider right now:

- Look for a DMS that integrates natively with Microsoft 365 to reduce complexity.
- Prioritize automation tools that are built directly into your workflows — not bolted on.
- Strengthen collaboration and governance with tools that don't compromise compliance.

The good news? You don't have to navigate this on your own. We'll be in touch soon to share how an intelligent DMS can simplify your workflows, enhance collaboration—both internally and externally—and ensure your documents stay secure.

9-13 "Yes" Responses

You're on the Right Track — with Room to Level Up

Based on your responses, you're already making strong moves in legal tech, especially as it relates to a document management system. Nicely done! From automation to collaboration, you've put some important foundations in place.

But there are still a few key areas for improvement, like:

- Automating more workflows within the DMS to eliminate bottlenecks
- Expanding your use of semantic search and AI-powered insights
- Strengthening content enrichment to improve knowledge retrieval

The good news? You don't have to navigate this on your own. We'll be in touch soon to share how an intelligent DMS can simplify your workflows, enhance collaboration—both internally and externally—and ensure your documents stay secure.

14-16 “Yes” Responses

You’re Ahead of the Game!

Thanks for completing the checklist. Based on your responses, you’ve clearly made smart, strategic moves to modernize your tech stack — kudos! With a strong foundation in place, you’re well positioned for continued success in 2025 and beyond.

Even for high-performing teams, there’s always room to level up. Here are some examples to consider:

- Automating complex, advanced workflows that haven’t been automated yet
- Making your taxonomy and content enrichment strategies more dynamic
- Improving adoption of built-in collaboration and AI tools so they’re being used to their full potential

Let’s connect to explore what’s next for your strategy and how to best prepare for the horizon.

Ready to see an
intelligent DMS in action?

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About NetDocuments

NetDocuments enables legal professionals to do their best work with an intelligent document management system (DMS) that goes beyond getting organized and brings to life seamless AI, powerful workflows, and smarter experiences. The #1 trusted cloud-native DMS for 25+ years, NetDocuments delivers tools to make work easier throughout the document lifecycle — from award-winning automation and AI to email management, search, collaboration, document bundling, advanced security, and more. The platform also integrates with 150+ other technologies, including Microsoft 365, DocuSign, and practice management systems, making it a core solution that meets users wherever they work.

Supporting more than 7,000 law firms, corporate legal departments, and public sector organizations worldwide, NetDocuments is recognized as one of America’s fastest-growing private companies, appearing on the Inc. 5000 list for three consecutive years.

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