



docmoto



Neil Cameron Talks Mac-Based Document Management and the Law Firms That Need It

Executive Interview — Neil Cameron
Founder, CHL Software

By Neil J. Squillante
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To borrow a legal cliché, CHL Software is Exhibit A for the ability of savvy entrepreneurs to identify underserved markets. CEO Neil Cameron founded CHL Software as a technology consultancy in 1996. Late last decade, the clamor from clients — most of them law firms — for a Mac-based document management system (DMS) had grown so profound that he pivoted the company into software development.

In 2011, CHL Software shipped the first version of DocMoto. Steve Jobs famously said of the first version of iTunes for Windows that it was “like giving a glass of ice water to somebody in hell.” Early adopters felt the same about DocMoto as do new customers who make the switch from the macOS Finder, file servers, or cloud storage services.

Recently, Cameron and his team shipped DocMoto v4, the biggest launch in the company’s history. As documented in [TL NewsWire](#), marquee features include a more Finder-like user experience, automated email capture, document dashboards, and granular security settings.

To better understand the vision behind CHL Software, I recently spoke with Cameron about DocMoto, Macs, and document management.

CHL Software is headquartered in Cheltenham, perhaps best known for its



Neil Cameron

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dramatic horse jumping races. Tell us about Cheltenham and why CHL Software set up shop there.

My association with Cheltenham goes back to 1983 when I arrived here as a sponsored student to work for a large aircraft engineering firm. My birth place is Manchester, best known for soccer.

After completing my degree in Electronic Engineering, I decided I liked Cheltenham so much that I would stay, even though my employment with the aircraft component manufacturer ended in 1988.

Cheltenham is a wonderful place to live. I can get to London as well as the major Northern cities in a couple of hours. But I am surrounded by the most beautiful Cotswold countryside and fabulous regency buildings.

How did your love affair with the Mac begin and which Mac(s) do you currently use?

My first exposure to Mac was with the original Mac SE back in 1988. At the time I had just become a software salesman. Even by then the IBM PC was the “industry standard” but none of us on the sales team could see why. In 1988 Windows 3.11 wasn’t even that common.

I currently have a MacBook Pro, several iPads, and an iPhone SE. My choice of phone is largely determined by the fact that I work on classic cars in my spare time. It’s not unheard of for me to accidentally drop my phone in a bucket of engine oil or worse, so I don’t want the top of the range model.

Why did you decide to tackle document management on the Mac back in 2011?

We started development of DocMoto back in 2007. It took us until 2011 before we had a creditable product. In 2007, Apple was a much smaller company. The iPhone had not been released. It sounds crazy today given the current size of Apple, but back in 2007

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DocMoto Pioneered Document Management for Macs

- Neil Cameron founded CHL Software in 1996 and launched DocMoto in 2011.
- Law firms switch to DocMoto primarily for multi-user support and scalability.
- DocMoto v4 launched in 2018 with a focus on user experience and email.
- Tabbed windows, Recent Documents, and Favorites in v4 improve productivity.
- Mailbox Rules and Mailbox Patterns in v4 automate email filing by client and matter.

part of our thinking was that Apple was a much smaller company than Microsoft, and that by developing document management software for the Mac platform we would attain an element of uniqueness.

macOS is not designed for lawyers. When do law firms outgrow the Finder’s document handling and what are some of the problems they encounter?

macOS isn’t designed for multi-user scenarios at all. The big issue Mac-using law firms face is that searching even a shared drive is difficult. From three employees upwards they seriously struggle to reliably find material. The other big problems law firms run into are a lack of firmwide storage of email by client and matter, and an absence of any kind of document authoring control.

How does DocMoto v4 address these problems?

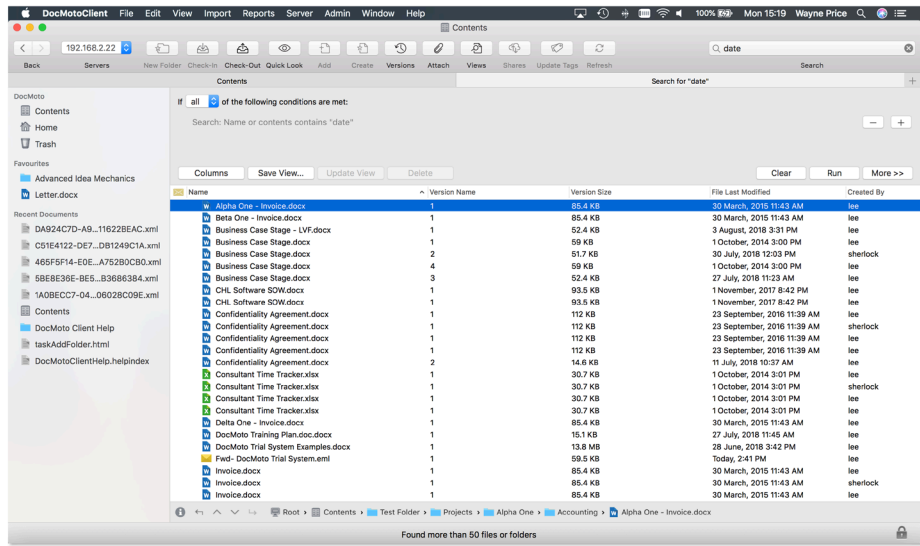
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When you gave me a demo of DocMoto v4, you mentioned several times that your biggest competitor is the Finder and that your guiding philosophy is to take a minimalist approach. How has this manifested itself in DocMoto?

That is right. I always say that the biggest competitor for any document management product is “nothing at all.” Nothing at all on a Mac is Finder, and for Windows users it’s Explorer. The biggest factors about using nothing at all is it’s reliable and everybody can use it.

So anybody looking to beat “nothing at all” needs to be every bit as reliable and easy to use plus deliver some serious benefits on top.

In terms of DocMoto this manifests itself in an endless drive to keep things simple. That is why our interfaces are clean, and clear of excessive buttons and options. If users want



DocMoto Features Fast, Comprehensive Document Searches

more complex features, they exist, but we don’t force them on anybody.

Our feature set differs markedly from the Finder. DocMoto is multi-user, content is completely searchable via global search, sophisticated tagging facilitates categorization, and recent documents and favorites lists provide fast user access to documents.

In fact, one of our first ever features remains our most popular — a multi-user trash bin. Without DocMoto, users working on shared drives have no choice but to restore a backup if they accidentally delete a file. With DocMoto, it just gets put into the multi-user trash so it can be easily restored.

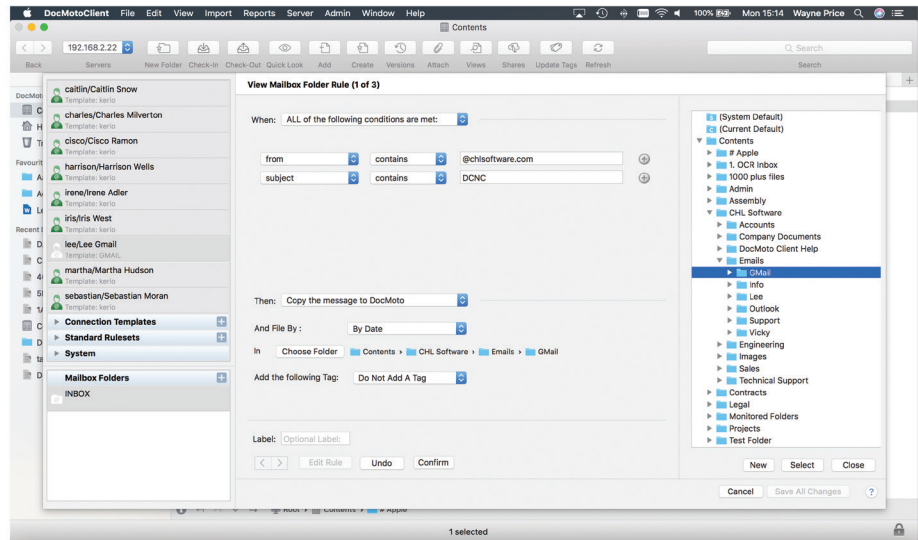
Let’s talk about other competitors. Why do law firms that use file servers or cloud services like Dropbox switch to DocMoto?

The key reason firms switch away from file syncing systems is they struggle to cope with the enormous volume of material. We routinely deal with small firms with well over 300 GB of data. Any syncing system is going to struggle with that volume. DocMoto is not a syncing system so it sidesteps the problem.

Another big issue many cloud users face is that the services are almost always browser-based.

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DocMoto is a native Mac app. This means we have none of the restrictions of browser-based systems. For example, when a lawyer downloads a file from DocMoto we can control exactly where it goes, not just dump it in the Downloads folder. Users can also drag and drop documents out of DocMoto into apps like Mail. This isn't possible with browser-based systems.



DocMoto's Mailbox Rules Automatically File Matching Email

DocMoto has a growing number of law firm customers that I would characterize as “midsize” with 30+ lawyers. But many started out as solos and have stuck with you. Tell me about these law firm entrepreneurs and how they influence your product development.

You are absolutely right in what you say. It is common for us to start working with a 3-5 attorney firm and see it grow with us to 20, 30, or more attorneys.

Take South Carolina-based [Grayson Thomas](#) for example. They chose macOS over Windows and knew the choice of document manager was key. After a few “false starts” with other products they settled on DocMoto. Founding partner Clay Grayson told me, “DocMoto has enabled us to scale up our practice very quickly. That’s a difficult proposition in a law firm unless you have a

technology platform that works for your way of business.”

Our customers influence us in several key ways. First, we know all our customers, and in almost every case they speak with us on a regular basis. This makes us realize our responsibility in providing them with the very best tools we can.

Second, they provide us with feedback. We are open to that, and I know many of our customers can point to a feature in DocMoto that they personally had a hand in. For example, DocMoto offers tabbed windows. These tabs now remain intact when you login from your last time using DocMoto. This wasn't something we had built in originally, but a lawyer pointed out the benefits, so we added it.

It's time to talk about my favorite topic — email. What did your law firm customers tell you about email that inspired you to make it a major focus of DocMoto v4?

They told us that email is very difficult to control. In some ways almost out of control. But vitally important.

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variety of reasons, including the sometimes-patchy support for comprehensive dragging and dropping of email in and out of mail apps, we felt we needed to add more.

In version 4 we did just that, with our automated email import technology. This doesn't replace dragging and dropping from mail clients, but supplements it so that you're manually filing email much less frequently.

Regarding these email import tools, DocMoto v4 offers two new ways to manage email – Mailbox Rules and Mailbox Patterns. Explain each and their rationale.

A Mailbox Rule determines how the content of a mailbox (folder) is processed. A simple example might be “all mail from client A goes to DocMoto folder A.”

A Mailbox Pattern determines whether the DocMoto mail monitor is “interested” in a given mailbox based on its characteristics. We use the idea of a pattern rather than defining an actual mailbox because it means the system automatically monitors any new mailboxes as they are added, so long as they adhere to the pattern.

This concept of “set up once and let it grow automatically” has been key in the design of our email import technology. There is always a setup requirement in software, but we want that setup for Mailbox Rules and Mailbox Patterns to be a one-time event. We don't want to burden administrators every time the firm adds a new client, or hires a new employee.

How has document management changed since 2011, and what changes do you anticipate going forward?

The big change is the cloud.

Since we launched DocMoto in 2011 we have always supported both on-premise and cloud installations. But today around 70% of our customers are cloud hosted.

Going forward I see more integrations. Ten years ago, how many people had heard the acronym API, short for application programming interface? Today most software has an API and it's becoming a commonly understood term because it's what makes third-party integrations possible. Many of the firms we work with are aware of APIs, and increasingly poised to use them to achieve greater productivity.



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Neil J. Squillante is the founder and publisher of TechnoLawyer, an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer the only email subscription they need. Previously, Neil practiced commercial litigation at Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University.

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