

Law Firms Can Now Show Exactly Which Client Files Moved, Without the Manual Search

Leading firms estimate a single client transition, attorney departure, or lateral hire costs \$5,000 or more in manual searching. A new capability from Shinydocs speeds up that work and gives firms a defensible answer to a critical question from clients, regulators, or firm leadership: what actually moved, and what didn't?

37%

Of in-house legal heads who changed their outside counsel criteria over politics, already dropped specific firms, per a 2026 ACC and FTI Consulting survey

\$5,000+

Estimated cost in manual searching per matter mobility event, based on conversations with firm IT and information governance teams

Hours, not days

Time to complete a fully documented transfer, down from days of manual search and IT coordination

Kitchener, Ontario, September 21, 2026. Shinydocs today announced firms can identify and evaluate the content connected to a client's matters in hours, with a defensible, time-stamped record of what was found. Firms request a review, and the system automatically identifies files that appear related to the client's matters, using metadata, participant and client-name matching, and contextual keyword analysis across every connected repository, including the firm's document management system, shared drives, and email archives. That even includes unfiled email never tagged to a matter number, surfaced with transparent identification criteria for the firm's team to review, not moved automatically.

Client files move for all kinds of reasons: A client moves to a different firm, an attorney's departure, a merger, or a matter closing. Firms must identify and evaluate the client-related information that may be eligible for transfer, no matter which system it is saved in. Described as slow, manual, and expensive for years. The costs reflect the time, paralegals, Information Governance professionals, and IT staff spend combing shared drives, inboxes, and legacy systems for content needed, even if it is never linked to a matter number. This cost recurs with every transition, on top of the obligation under Model Rule 1.16 to handle client files promptly and appropriately. Both sides of that equation are growing: a 2026 ACC and FTI Consulting survey found that among in-house legal heads who changed their outside counsel criteria over political considerations, 37 percent had already dropped specific firms, while lateral hires outnumbered entry-level hires among U.S. law firms in 2025 for the first time since 2023, according to the NALP Foundation.

A client expects this to be complete on day one - Information Governance and IT teams carry the risk of missing something critical or sending the wrong client's information if the handoff is rushed. That pressure increases knowing a firm may have legacy systems and inconsistent filing.

Content identified as potentially privileged, confidential, regulated, or otherwise requiring review is flagged for a real human to review before anything moves. Automation accelerates identification and collection, and the firm's Information Governance team makes every judgment call on what transfers, drawing on knowledge of the client relationship. The verified content is then handed off with a comprehensive audit log of what was found, reviewed, and moved. This reduces coordination across Information Governance, Risk, Legal Operations, and IT. A consistent, defensible methodology applies every time, and firm-side copies can be evaluated against applicable retention policies once a transfer closes.

"Firms don't just need proof that a transfer happened. They need a defensible record of how every file was identified, reviewed, and decided on, from the first search to the final handoff. We built this so that record is automatic, not reconstructed after the fact."

Duncan McGregor, CIO, Shinydocs

The same challenge shows up everywhere unfiled content accumulates: email never linked to a matter, duplicate copies sitting in both a mailbox and the document management system, and content from mergers or past migrations that was never fully reconciled. Firms do not need to resolve all of it by hand. They need a consistent way to find it, decide what happens to it, and show their work.

Learn more here: <https://shinydocs.com/legal-matter-mobility>

About Shinydocs

Shinydocs gives law firms and other information-intensive organizations a fast, defensible way to identify, evaluate, and hand off the files that matter, across every system they run, with no file migration required.

Media Contact: Darcy Manderson · VP of Marketing · dmanderson@shinydocs.com · 1-226-793-6478

www.shinydocs.com