



Legal Firm Boosts Productivity With Document Imaging

eRecords Program Produces Results for Major Law Firm



For the largest law firm in Michigan, with a history going back to 1852, Canon Business Process Services worked with the firm’s litigation practice to develop and deploy an eRecords pilot that improved the firm’s productivity, eliminated duplications and reduced business risk. The pilot was a critical first step towards realizing the firm’s overall vision of reduced dependence on paper while strengthening business continuity and disaster recovery protections. Additionally, the implemented changes helped position the firm to meet future client needs.

THE CHALLENGE

A leading international law firm committed itself to reducing its dependence on paper-based case management files in order to improve productivity. The firm’s goals included slashing the time necessary to respond to client requests and improving internal access to case-related materials, critical for a firm with attorneys located in multiple offices. The firm knew that to realize its vision of creating an environment less dependent on paper, it would face challenges that included making the new practices and procedures acceptable to the firm’s attorneys.

Initially, the processes by which information was saved electronically were ad hoc. Attorneys and staff would independently scan documents, saving them on individual hard drives, network computers or as a part of their email.

As these practices proliferated, the firm’s computers and network servers became clogged with multiple copies of scanned documents that were saved with different naming conventions. Multiple unmanaged storage locations and a

lack of standards made it almost impossible to search and retrieve a specific file. The firm needed to implement a more standardized scanning system that was aligned with its physical records management process, and would allow for faster and easier access to requested case-related materials.

The firm launched the pilot project to create an electronic case management process that involved saving document images to folders using the same naming conventions as the physical files stored in the firm’s central file system. This provided continuity between electronic and physical files. The scanned images were stored as easily accessible electronic case files in folders on a shared drive, a standardized process developed with input from the firm’s staff. An internal survey of the firm’s attorneys and staff indicated that the document imaging system would be adopted due to its ease of navigation and similarity to the physical file management process. However, the firm still needed to address several challenges in order for the program to meet its overall goals.

Canon Business Process Services gave the firm the road map from which to expand their vision for a paperless office.

One key challenge was that the scanning system only captured images of documents that were explicitly submitted. This left out numerous documents including emails, memoranda and other correspondence created by the firm's staff that should also be captured for reference. Additionally, the images saved on the servers were not integrated with the firm's document management system (DMS). This approach was inefficient because it isolated scanned images from other case-related documents and created risk in the form of potential business continuity issues.

The firm engaged Canon Business Process Services to help cost-effectively meet these challenges and realize the firm's overall vision of reduced dependence on paper, while ensuring business continuity and disaster recovery requirements.

THE SOLUTION

Working with the firm, Canon Business Process Services launched a new document imaging initiative titled the "eRecords program." The new approach was designed to provide a complete digital case management system that would enable faster, easier access to documents, provide business continuity in the event of a disaster and eliminate duplicate scanning of documents.

The Canon process was expanded from the pilot stage to include other key cases, ensuring that all case-related documents were collected from the firm's staff throughout the day and then scanned into the firm's DMS, using the same naming conventions for both electronic and physical records. Every document was processed before being submitted to the firm's central file system. This included allowing staff to electronically submit emails, court e-file documents and other case-related materials for inclusion in the system. In instances where a specific document had already been electronically stored and profiled, a duplicate was not created. This process continues to this day, although Canon has worked with the firm and IT as other technologies were implemented to electronically capture emails and other digital correspondence, improving efficiencies even further.

The documents are stored and profiled in the DMS so that the firm's staff can locate them with a minimum of search criteria. In most cases, only three criteria are needed, which include client number, matter number and file designation. This approach makes searching and retrieving electronic files easier because it mirrors the firm's physical records management process.

THE RESULT

By developing and deploying the eRecords program, Canon Business Process Services has helped the firm realize the following benefits:

- + A competitive edge and strategic advantage due to streamlined document management processes and billable company records service.
- + Increased productivity in being able to more quickly and efficiently find electronically stored information.
- + Measurable savings in billable hours traditionally spent waiting for physical information to be retrieved and reviewed.

This combination of factors created a path for electronic records and created the potential, through expansion, to reduce the long-term archival costs associated with cases.

1-888-623-2668

Advancing Business Performance to a Higher Level

Canon Business Process Services, a wholly owned subsidiary of Canon U.S.A., offers managed services and technology for information and document management, business process outsourcing and specialty workforce services. We help clients improve operational performance while reducing cost and risk. Canon Business Process Services has been named a Global Outsourcing 100 Leader by IAOP for the past eleven years and recognized in the Gartner Magic Quadrant for Managed Print and Content Services for five consecutive years. We have also been acknowledged by CIOReview magazine as a "20 Most Promising Legal Technology Solution Provider."

Learn more at cbps.canon.com and follow us on Twitter @CanonBPO.