



Technology Brief

FOR IT PROFESSIONALS

Less Paper Means More Productivity For Your Law Firm By Steven J. Best, Esq. Partner - Affinity Consulting Group

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Making your office less reliant on paper production can be a bit of a challenge. There are some key steps you may take to begin to move your firm to a completely less paper dependent existence. In the age of “Google”, there is a very real expectation that your firm or legal department will have access to information rather instantaneously. And the result of same is that productivity, mobility and global access are some of the very real benefits realized without reliance on paper.

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What is Paperless?

Over the past decade, “paperless” has been a hot topic in law offices and legal departments. It continues to be a “hot” topic in 2014 and will probably be so for the rest of the decade at the very least. The concept of paperless is founded in the obvious concept of NOT printing words onto paper. Frequently, lawyers, paralegals, legal assistants and staff at most law firms are surrounded by large piles of paper, books and paper products. The focus of this article is to hone in on the concept of less paper leading to an increase in productivity.

You may ask, how can there be a correlation between printing on paper and productivity. Frankly, this concept is rather straightforward. Printing to paper leads to singular output...your words are on a sheet of paper that must be stored somewhere. However, keeping that same information in an electronic format essentially makes the same output accessible from anywhere. And, typically, computer grounded search tools and search capabilities are employed to find and reference that same information.

Take legal research as a prime example. Thirty years ago, we sought citations from large books in law libraries, checked other books for updates to the opinion(s) upon which we intended to rely, and we most likely also made photocopies of those pages (perhaps on stinky mimeograph paper). Today, legal research is all computerized, accessible from anywhere and up to date. Why should the same NOT hold true for legal department documents, spreadsheets, emails, etc. Why not create an environment where ALL of your internal firm media is electronic and available from anywhere you are in the world upon demand? The truth is that this concept is very real today.

Quite frankly, when the staff of a law firm or legal department is asked about their biggest frustrations as it relates to productivity and job efficiency, managing volumes of paper is often at the top. People often spend hours of unproductive time filing away and then, later, looking for paper. Paper files can only be in one place at a time; there is no sharing or collaborating on a paper file; you cannot do a standard computerized search on a paper file. You can only flip paper one page at a time.



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The amount of office space that is used by filing cabinets and bankers boxes can be overwhelming. This author has personally witnessed office facilities where paper takes up more than 25-30% of the physical facility. In addition, many firms have offsite storage locations adding to the paper jungle beyond the office facility. And, should you need that paper again, there are retrieval costs.

Less Paper Route

Then, what is the best route to the paperless office? While the concept of an office with zero paper is not a reality for most firms, but having much less paper is. Below are ten practical steps you can take to get your firm moving in the direction of the paperless office.

1) Make sure there is a reliable foundation in place to build the paperless office platform. It is not realistic to set out to accomplish this goal if you have computers and servers that are older than 3 - 4 years. This is possibly going to be a big, revolutionary project that will take your firm or legal department to a whole new level of efficiency. It is not necessary to have state of the art, brand new, best you can buy equipment, but at the same time, you most likely cannot rely on outdated technology either.

2) Make scanning easy. Turning paper into electronic media is one of the key elements to becoming and remaining paperless. To that end, which scanner hardware to purchase is both a productivity and total cost of ownership question for your team(s). Many firms have tried going down this road with ONLY a large, beastly, central copier/scanner/printer. Almost always, this is not the right solution by itself. From productivity standpoint, fast, reliable desktop scanners are simply better options as it makes scanning easy. Large jobs, yes, you may need the large central scanner, but many scan jobs are less than 50 pages, which a desktop scanner will handle with ease and simplicity.

3) Dual Monitors: In order for your staff to find a level of comfort in NOT printing documents to paper, you must provide a reasonable palette upon which they can read, review and edit electronic copies of documents. Dual monitors provide not only this palette upon which documents (whether a Word, WordPerfect, PDF, Outlook, Excel or PowerPoint document) can be read, reviewed, edited, adjusted, commented, highlighted, compared, and the like), but such an adjustment shouldn't take up other normal computer tasks such as e-mail review and replies, calendaring, internet searches, practice management functionality and the like. Some users may profess to not wanting or needing dual monitors, but don't believe it. Frankly, these may be the same folks you identified in Section III (initial steps) above. Try this....for anyone who doesn't want a second monitor, get it for him/her anyway and ask them to use it for 2 weeks. This author can virtually guarantee that he or she will be hesitant to give the dual monitor functionality up after the 2 weeks are up.

4) Update your document storage rules. If you store word processing documents (and PDF's, etc.) in "computer" folders that are first organized by user instead of by client/matter, moving toward a central, firm wide client/matter folder structure that is first organized by client and matter is a good FIRST step. This is even more critical if your firm chooses to achieve the paperless goal without a Document Management Solution (see below). Everyone must be able to go to one client/matter folder and see all documents and PDF's for that specific client/matter – no matter who created the document. Having multiple folders for the same client matter stored beneath "user" oriented folders is inefficient, ineffective and impossible to properly manage.



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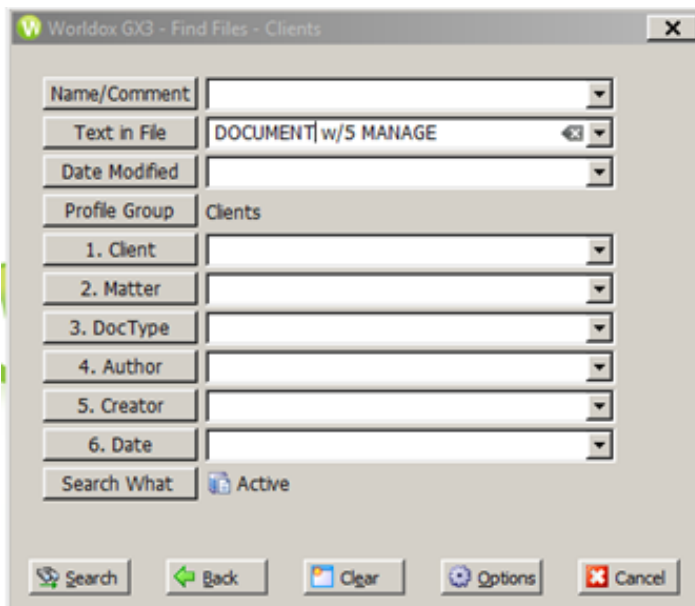
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5) Update Your Word Processing Suite. Frankly, if you're still adhering to OLD Word Processing software, you may find your users struggling to save documents digitally. Older software packages often time are not compliant with things like PDF productivity toolbars, document management software and the like. Newer suites, like Office 2010 or 2013 and WordPerfect X5/X6 not only permit add-ins of appropriate suites of paperless tool software, but also can produce PDF's and/or decode a PDF back to Word Processing format natively.

6) Document Management Software. Despite the protocol set forth immediately above, storage protocols are worthless if you can't find what you are looking for. And they're further inept if others can't find what you've stored and vice versa. Document Management Software (DMS) is absolutely the key to paperless success. It provides a foundation for your paperless practice. In short, DMS packages will search through hundreds of thousands documents that contain the phrase "motion to compel" AND the word "easement" created or modified in the last twelve months in mere seconds.

Below is an example of a search template in one of the more popular DMS platforms: Worldox¹ (www.worldox.com). Note that you can search for both Text in File, Document Name, and/or among many criteria including date modified, client (or department), matter, document type, author, creator and/or date stamped. Because DMS systems like this include a network based indexer, anyone in your firm or department will receive rather instantaneous "hits" to your query for a document, e-mail, e-mail attachment, spreadsheet, text file, searchable PDF, and the like

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Note that you are able to search a myriad of fields quickly and easily. The illustration to the left is just an example of a DMS search template.

¹ Orion offers exceptional integration with Worldox DMS.



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Results to the above database query literally took 2.5 seconds over a local area network and slightly longer in a cloud environment:

Folder	Description	Doc ID	Ver#	Modified	Client Des	Matter	DocType	Creator
	Modified: 2 weeks ago (10/19/2013 - 10/13/2013)							
Documents	Audit Report Draft (see also A01...	A0112427.DOCX		10/14/2013 10:17 AM		40169-001 CORR		SJB
	Edits made by SJB - sent to BKH for his edits on 03 OCT 13							
	Modified: 3 weeks ago (10/12/2013 - 10/6/2013)							
D:\	2013-05-16 - HC Park Recomme...	A0107369.DOCX		10/9/2013 06:28 PM		40117-003 PROP		BKH
	Modified: Last month (Sep 2013)							
C:\	Tech Audit (Draft) for Bamberge...	A0112001.DOCX		9/23/2013 01:45 PM		40169-001 CLIENT		SJB
D:\	Document Automation / Document Management audit							
	Modified: 3 months ago (Jul 2013)							
D:\	Re: Instructions to connect to D...	A0109482.MSG		7/18/2013 05:02 PM		40105-001 CORR		SJB
D:\	RE: A few PCLaw issues...	A0109483.MSG		7/16/2013 11:37 AM		40105-001 CORR		SJB
D:\	RE: A few PCLaw issues...	A0109484.MSG		7/16/2013 07:24 AM		40105-001 CORR		SJB
D:\	RE: A few PCLaw issues...	A0109485.MSG		7/15/2013 04:36 PM		40105-001 CORR		SJB
D:\	RE: A few PCLaw issues...	A0109486.MSG		7/15/2013 01:22 PM		40105-001 CORR		SJB
	Modified: 4 months ago (Jun 2013)							
	Recommen...	A0107082.DOCX		6/15/2013 03:21 PM		25185-001 ADMIN		DLF
	Audit as su...	A0106914.PDF		6/11/2013 11:00 PM		25477-001 CLIENT		SJB
	Modified: 5 months ago (May 2013)							
	2013-05-22 - Recomme...	A0107371.PDF		5/22/2013 02:43 PM		40117-003 PROP		BKH
	A0106821	A0106821.PDF		5/22/2013 02:43 PM		000000		
	Modified: 7 months ago (Mar 2013)							
	2013-03-10 - Partially Executed ...	A0101765.PDF		3/10/2013 07:23 PM		40068-001 ADMIN		DD
	2013-03-01 - ...	A0101439.PDF		3/1/2013 08:48 AM		40068-001 PROP		DD
	Modified: 8 months ago (Feb 2013)							
	Legal Systems Business Case v2.0	A0101433.DOCX		2/28/2013 12:49 PM		40068-001 ADMIN		DD
	Modified: Last year (2012)							
	... from ...	A0062923.MSG		10/10/2012 03:46 PM		25218-001 CORR		SJB
	PCLaw upgrade proposal flat fee							

Note that the search results included e-mails, Word documents, PDF's and e-mails with attachments. DMS affords you the ability to combine your paperless protocols with the ability to search across multiple folders, platforms and document types. In fact, the author HIGHLY RECOMMENDS that you plan to invest in DMS software as a part of your "going paperless" budget.

7) Create easy to follow procedures – Once you have decided to head down the road to paperless efficiency, quite possibly the most important thing you can do is create written procedures establishing a protocol on digitizing your legal department/law firm. Include in these procedures who, what, where, when and how digital data will be stored, and how to dispose of scanned paper. Store the procedures document in digitally for easy access by anyone in the office (or anywhere in the world).

8) PDF Proficiency: Another key step in paperless efficiency is to ensure that all users master a modicum of proficiency with PDF production software. First, allow me to define PDF production software. This means that you and your staff can CREATE a searchable PDF either from documents you draft and print to a PDF printer (or create via an embedded toolbar in your word processor) AND that you can create a searchable PDF by scanning in a paper document. What this typically means is that FREE PDF "readers" are not considered PDF production software. What this usually means is that you have to PAY for PDF production software. PDF proficiency also means that your staff should not only be able to create a searchable PDF document, but also should be able to manipulate a PDF document once created including: using highlighters, text editors, sanitizing (to remove METADATA) functions, stamp tools (for signatures), commenting, form creators and the like. And, if you litigate, you must be able to save your PDF as PDF/A² compliant for the Courts.



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9) Snail Mail Protocol – Develop a system to scan in and distribute traditional paper mail electronically in your office. How nice would it be to review your ‘snail-mail’ on your computer screen and/or not have to go to the office to retrieve a snail-mail document after hours. Once your data is stored electronically and the scanning begins, this becomes a fast reality.

10) Train your staff – Think of training not as a single event, but an ongoing protocol. Most people have an aversion to change. Moving from holding paper in your hands to viewing and manipulating documents on the screen is a hard adjustment (realistically...for this to work well...everyone will need dual monitors). The best investment you can make for your staff is to ensure they have adequate training in both your new paperless protocols, but also in your document management solution (if you choose that route) and PDF proficiency. Honestly, don’t skimp on the training. Everyone will be happier and more content if expected to master a new system on his/her own. In fact, without training, efficiency WILL suffer as it will take your staff longer to produce the same work product because they will not know where the new “buttons” are (so to speak). This will lead to frustration and a longing for the “way we used to do it”, which, in turn, starts you on a path toward project failure. Make sure your paperless trainer is available for staff questions after the “go live” date. And, most importantly, please make sure everyone understands the training goals, and then make sure they understand the process.

11) Old Files in Storage: What about the boxes we have now? For the time being, this author suggests that you simply let this sleeping dog lie (so to speak). You may decide at a later date to process the old files, but as you are getting started, it is critical that the task does not become overwhelming. If users have to scan current AS WELL AS old boxed documents, adapting to the new paperless protocol can become overwhelming. Simply let the boxes work themselves out over time, follow state or provincial bar document retention policies and begin to destroy same over time. For critical documents that you may want to keep for a longer period of time (i.e. copies of wills, for example), perhaps hire a summer clerk to deal with digitizing old paper. Take heart in the fact that you are not adding to the clutter of boxes anymore. Frankly, the time involved in scanning in one banker’s box – removing paper clips and staples, unfastening paper, dealing with paper jams because of paper that has been handled hundreds of times – is significant, and your office staff has daily work to do. So, start with “paperless” today, and start scanning and shredding incoming paper and determine how to manage the old files later.

12) Active Files – It is usually a good idea to scan the contents of your active paper files, unless they are ready to be closed. This will allow you to keep the “this point forward” mentality and not overwhelm your staff. As your users work with a file, have them (and allow them) the time to get the file scanned (or employ that summer intern). And, this writer suggests that you also provide scanners for your administrative staff as well. Administrative documents are often just as important as your client files, and “admin” documents make a grand footprint on your office space as well.

² PDF/A is an internationally accepted standard for PDF retention introduced by the International Standards Organization (ISO) in 2005. Most Federal and State Courts that now require filings by uploading PDF files, will not accept any PDF that is not first made PDF/A compliant. For more information, see <http://www.pdfa.org/>



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Finally

In closing, the motivators for going paperless are clear: productivity gains, costs savings, space saving, the need to share information, the protocol for saving and retrieving and a reduced environmental impact. If you consider all of these factors – that users will spend much less time looking for files, that you will not have to store so much paper, that you have made collaboration and sharing documents much simpler, and that you are doing something to reduce environmental impact – the move to a “less paper” law firm environment is a no-brainer! No matter whether you are a MAC user or a Windows user, you will forever clear the paper jungle.

About the author: *Steven J. Best is an attorney as well as a founding partner of the Affinity Consulting Group, a well-known and well respected law office practice management and technology company. He is the managing partner of Affinity’s Atlanta office. With an educational background in law, accounting and economics, Steve consults with law firms throughout the United States on law office technology solutions as well as sophisticated practice and document management issues. He is also a recognized expert on paperless office protocols and PDF production. Steve is a graduate of Rutgers University (B.A.) and the Emory University School of Law (J.D.). He is a member of the Florida and Georgia Bars and is also a certified consultant/trainer, maintaining certifications in many law office software products including time/billing/accounting, practice management, document management, PDF production, document assembly and paperless office packages.*

Steve is also a national speaker at many CLE programs throughout the US and Canada. Steve is currently the vice-chair 2015 ABA TechShow planning board, and is an active member of the ABA’s Law Practice Division. In his free time, Steve enjoys composing music, playing piano, running, cooking, and has recently started learning and appreciating the many benefits of yoga. Despite his busy work life and travel schedule, he also enjoys spending as much time as he can with his wife of 18 years and his two, albeit moody and somewhat spoiled, teenage children.

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