

Scan With A Plan: The Sequel

ECMPG#3

Joe Davis, Applications Manager, McCarter & English, LLP

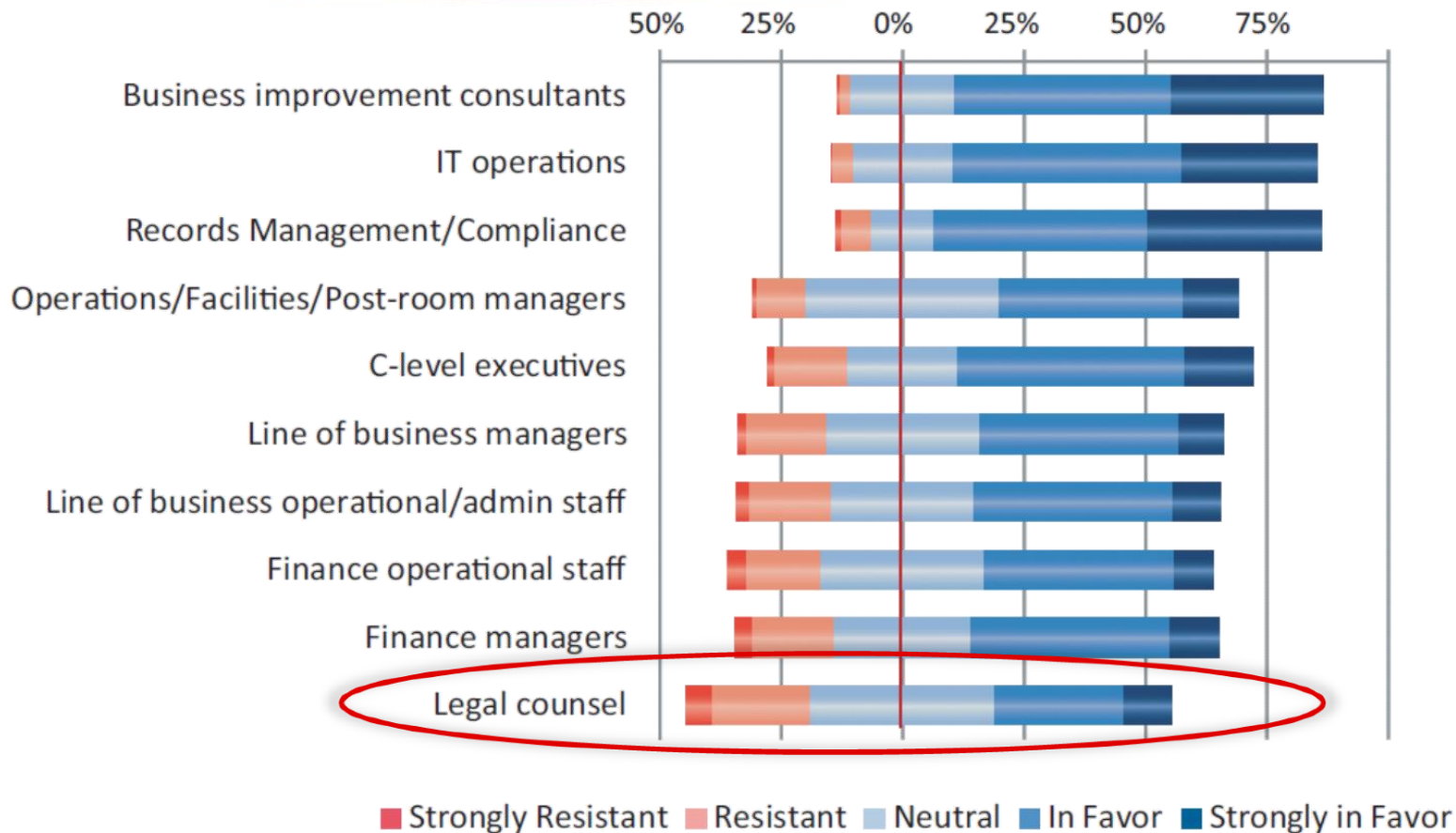
Deb Rifembark CMO, Chief Records Officer, Stinson Morrison Hecker LLP

Kathleen Jimenez, Data Management Administrator, Orrick, Herrington & Sutcliffe LLP

Amanda Kirton, Application Manager, Rogers, Townsend & Thomas, PC

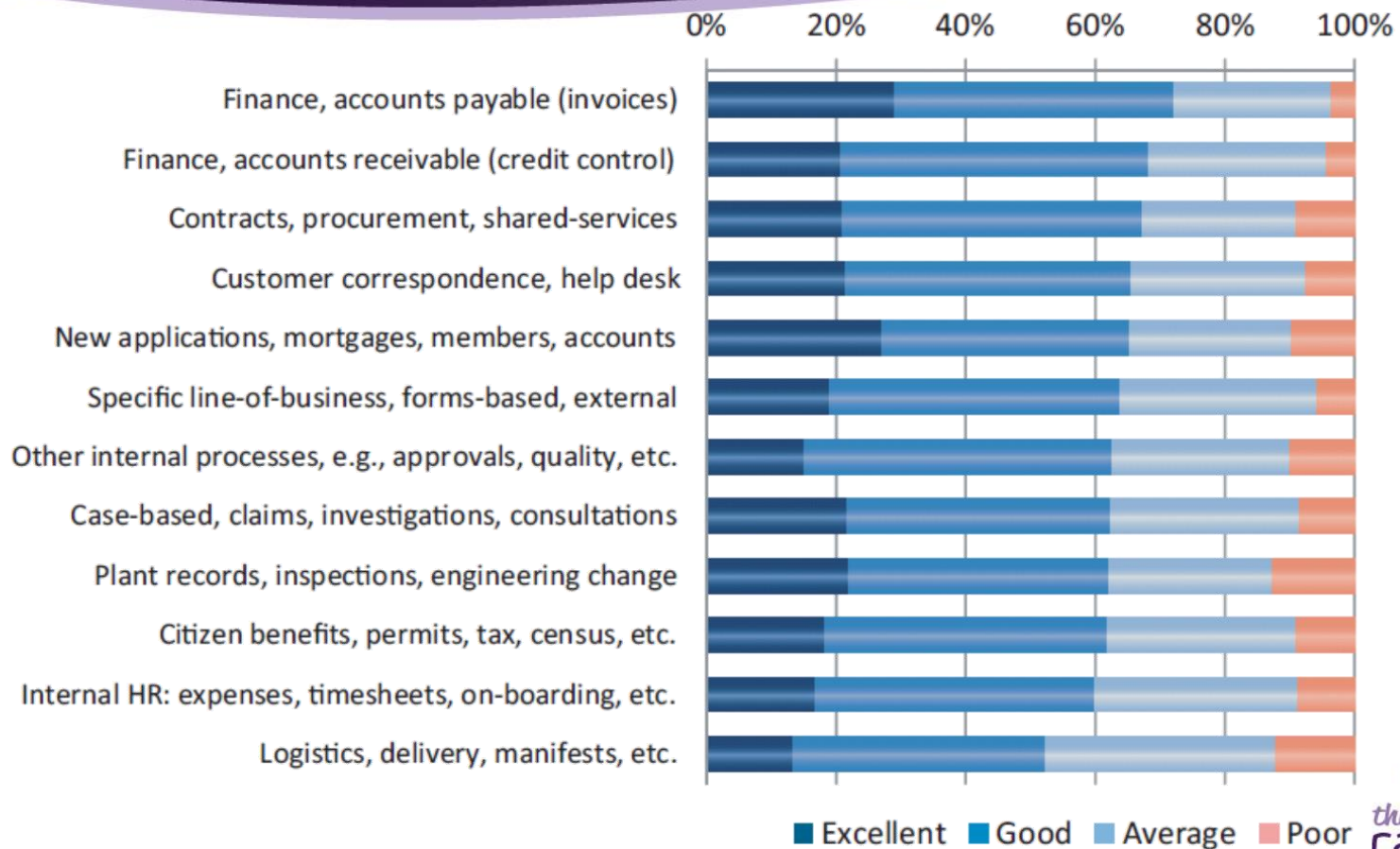


How would you describe the attitudes of the following staff in your organization to replacing paper in your key processes?

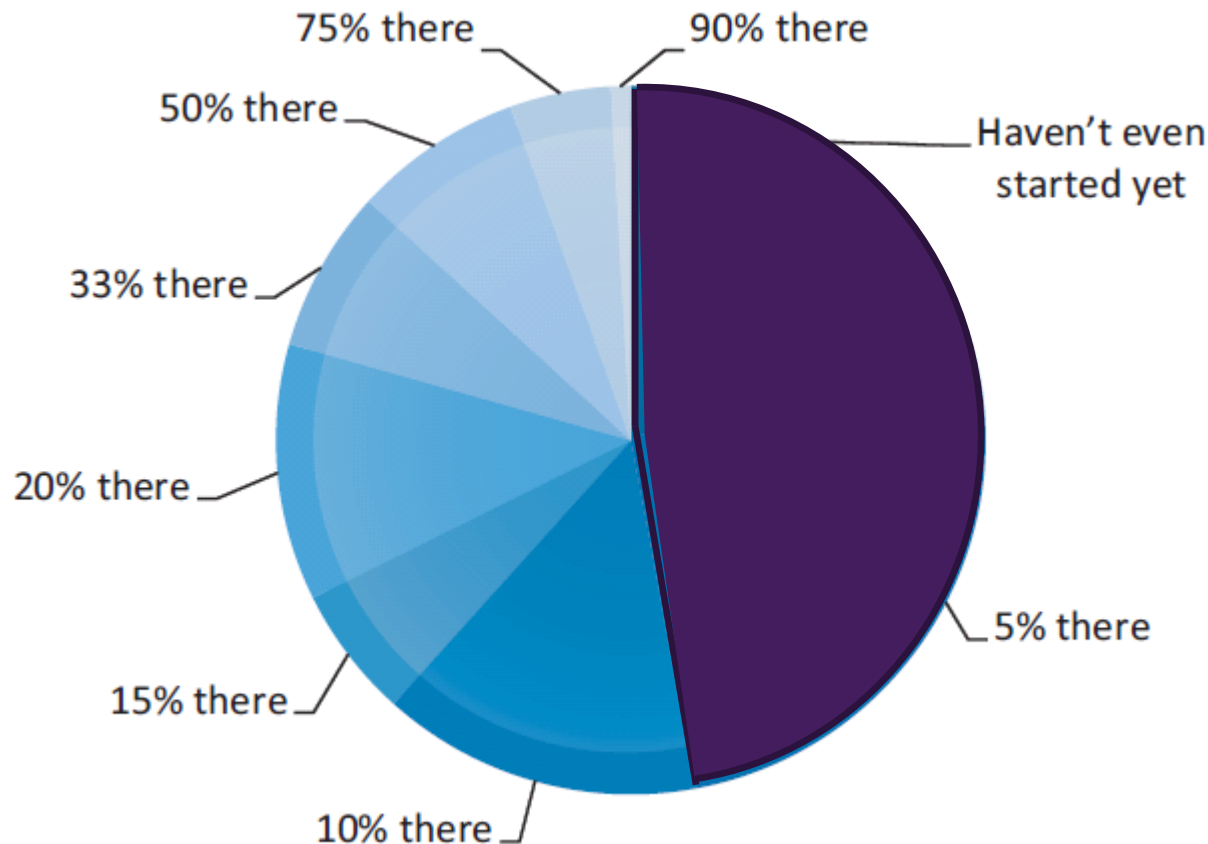


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If you have made the following processes paper-free, how would you rate the success or ROI of the project?



Thinking of all the potential processes where you could drive out paper using scanning and capture... how far would you say you are towards that goal?



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Scan With A Plan: The Sequel

Deb Rifienbark CMO, Chief Records Officer, Stinson Morrison Hecker LLP

- ◆ The Sequel
- ◆ The Takeaways
 - ◆ Culture change is possible.
 - ◆ Key to success = know your environment / resources / partnerships / right tools / automated processes.
 - ◆ Don't underestimate own staff's learning curve.

Scan With A Plan: The Sequel

Kathleen Jimenez, Data Management Administrator,
Orrick, Herrington & Sutcliffe LLP

- ◆ The Sequel
- ◆ The Takeaways
 - ◆ It is okay to start small, you can turn this into a firmwide initiative.
 - ◆ Think outside the box with resources, and use that as a selling point.
 - ◆ Ask questions of attorneys coming into your firm, you might find your starting part with them.

Scan With A Plan: The Sequel

Amanda Kirton, Application Manager, Rogers, Townsend & Thomas, PC

- ◆ The Plan and the Sequel
- ◆ The Takeaways
 - ◆ Man power to convert documents
 - ◆ Think outside the box - Mailroom staff, Capture at print
 - ◆ Understand your documents
 - ◆ What makes up a document? More than the template used to create it?
 - ◆ Executed copies vs. Filed copies
 - ◆ Types of documents - Getting everyone on board with a standard.
 - ◆ More than your just legal files
 - ◆ Accounting - Client Invoices, billing guidelines
 - ◆ Ability to working with administration can often be easier than with practice groups. Successes in these areas can also lead to easier adoption in the practice groups later.
 - ◆ HR - Your firm records are as important as your client records
 - ◆ Project Champions and the role they play in success

Software and Hardware

- ◆ McCarter & English, LLP
 - ◆ KwikTag, Metastorm, iManage
 - ◆ HP MFPs

- ◆ Stinson Morrison Hecker LLP
 - ◆ KwikTag, Omtool, ProScan. eCopy, ChromeRiver
 - ◆ Desktop Scanners, Multi Functional Devices, Fujitsu FI-5950 Scanner (high volume - used by Records staff)

- ◆ Orrick, Herrington & Sutcliffe LLP
 - ◆ Accurate, scans to iManage or Email
 - ◆ HP MFPs, HP flat bed scanners, Xerox MFDs

- ◆ Rogers, Townsend & Thomas, PC
 - ◆ AnyDoc OCR for forms, LawBase, iManage, PrintDistributor

More Resources

- ◆ Winning the Paper Wars, ©AIIM 2013, www.aiim.org
<http://www.aiim.org/Research-and-Publications/Research/Industry-Watch/Paper-Wars-2013>

Getting Ready to Digitize Your Enterprise Content

Critical Topics For Discussion and Planning

- ◆ **Know your firm culture**
 - ◆ Support from top down?
 - ◆ Understand your network - where are the records stored?
 - ◆ DataMap - Shared Drives, DMS, RMS, Hard Drives, Archives
 - ◆ What Paper Files Exist? Duplicates?
- ◆ **What is driving the change? (this becomes a selling point)**
 - ◆ Reduce FootPrint?
 - ◆ Lawyer Mobility?
 - ◆ 24/7 Law Firm?
 - ◆ Paper Storage Costs?
 - ◆ Collaboration Across Offices / Countries?

Getting Ready to Digitize Your Enterprise Content

Critical Topics For Discussion and Planning

- ◆ **Communicate with everyone**
 - ◆ Gather knowledge
 - ◆ How can we sell this change?
 - ◆ Keep supporters close
 - ◆ Team members?
- ◆ **Evaluate software / hardware**
 - ◆ Test, Test, Test
 - ◆ What works in one environment, may not in yours
 - ◆ Workflow may affect software choice

Getting Ready to Digitize Your Enterprise Content

Critical Topics For Discussion and Planning

- ◆ **Evaluate staffing requirements / knowledge**
 - ◆ Ability to add workload to existing staff?
 - ◆ Hire firm staff?
 - ◆ Hire Contract staff?
 - ◆ Combination?
 - ◆ Training requirements / program
- ◆ **Evaluate vendor partnerships**
 - ◆ Call on their expertise (help with ROI?)
 - ◆ Partner with staffing?
 - ◆ Space availability (reduce own footprint)
 - ◆ Contract review (confidentiality, new HIPAA requirements)
 - ◆ Development statement of work
 - ◆ Layout expectations to ensure no surprises

Getting Ready to Digitize Your Enterprise Content

Critical Topics For Discussion and Planning

- ◆ Evaluate potential gains in workflow
 - ◆ Time saved
 - ◆ Reduce storage needs for paper
- ◆ Evaluate value of records vs conversion cost
 - ◆ Day forward
 - ◆ Project based
 - ◆ Back file conversion

Getting Ready to Digitize Your Enterprise Content

Critical Topics For Discussion and Planning

- ◆ **Plan, Plan, Plan**
 - ◆ Workflow must be easy - keep it simple
 - ◆ Document all decisions within project plan
 - ◆ Gain approval / budget
 - ◆ Gain key team members - time allocation
 - ◆ Develop detailed procedures, training program, update policies
- ◆ **Launch project - projected time line**
- ◆ **Document lessons learned**