



BUYERS LABORATORY INC.

Solutions Report

A Buyers Laboratory Document Imaging Software Assessment

Omtool AccuRoute 2.1 Legal Platform



Overall	★★★★★
Ease of use.....	★★★★☆
Compatibility.....	★★★★★
Documentation	★★★★☆
Dealer Training and Support.....	★★★★★
Customer Training and Support	★★★★★
Upgrade Path.....	★★★★★
Ease of Integration.....	★★★★★
Security	★★★★☆
Global Business Readiness	★★★☆☆

Overview

Omtool AccuRoute Legal Platform is a server-based, document routing solution for large law firms with more than 200 attorneys. With its highly customizable document routing workflows, AccuRoute gives users the ability to quickly and easily scan documents from MFPs or scanners to e-mail addresses, network folders and a wide range of document management systems. The solution comprises two main components: software that runs on a server and client software that runs on end users' PCs.

Users can convert documents into various file formats, including PDF, TIFF, JPEG, RTF, DOC and TXT. Users can also combine existing electronic files with scanned materials and route the resulting images through the AccuRoute server. AccuRoute is sold directly by Omtool, Ltd., as well as through a dealer channel and a number of strategic business partners, such as Document Technologies Inc., Merrill Corporation, Xerox and Ricoh.

AccuRoute is hardware agnostic: the solution works with multifunctional products and scanners from virtually any manufacturer. This flexibility is provided by "routing sheets," which users create using AccuRoute's PC-based client software. A routing sheet is a hardcopy page that lists the destinations and actions (send to e-mail, network folders or backend systems) for a specific workflow. These routing sheets can be printed in advance and stored next to the MFP, or printed as needed to be used by the person who scans and routes a job. The routing sheet is scanned on the MFP with the document, and instructs the device to send the scanned data to the AccuRoute server and tells the server what to do with the scan.

SOLUTIONS



Overview *(cont)*

The AccuRoute Client, which is installed on individual PCs, lets users create routing sheets and send electronic documents to a variety of destinations, depending on the Connectors that are installed in the system. When composing a routing sheet, the user chooses one or more destinations for an outbound document on the client, which tells the server to generate a workflow (which Omtool calls an "embedded directive") for the job. The client provides the user with a routing sheet, which can be saved for reuse on the AccuRoute server or immediately discarded. When users save embedded directives on the server, they can be reused by either themselves or anyone else using the same server.

To send a hard copy document, users print out a routing sheet and scan it, along with the document, on a networked scanner or MFP. After scanning, the device routes the scanned file to the AccuRoute server, which detects the embedded directive and processes the file according to the user's instructions. To send an electronic file from the desktop, a user creates an e-mail and attaches the routing sheet and all relevant documents to the outbound message. The user then sends it to the AccuRoute server, which reads the embedded directive and sends the document on its way to all destinations simultaneously.

The AccuRoute Web Client allows users to access AccuRoute from any Internet-connected PC, either on the company's intranet or on the other side of the planet. Using the Web Client, users can initiate a job for AccuRoute or access delivery status information regarding documents they've sent via the AccuRoute server, create routing sheets and send documents, as well as resend and forward documents. Web Client also lets managers view and approve individual documents.

The AccuRoute PDF printer enables users to convert existing electronic files into PDFs and send them to fax and e-mail destinations. By simply dragging and dropping a file on AccuRoute's desktop icon, the program creates a PDF file and allows the users to send the resulting file via an existing embedded directive, or create a new embedded directive. Moreover, users can create special "watch folders" (electronic file folders located anywhere on a user's computer or the local network) that are linked to a particular routing sheet/embedded directive saved on the server. All a user has to do is drop a document into the folder, and it will be automatically routed along a given workflow without any further intervention.

AccuRoute integrates with many third-party document management systems and litigation support systems, including Interwoven WorkSite, Summation, Hummingbird DM5 and EMC Documentum. Omtool has developed a wide range of Connectors that enable AccuRoute to work natively with many third-party software applications. As a result, users will find it easy to integrate AccuRoute with many existing document management systems. When sending a file to a document management system, AccuRoute invokes the document management system's user interface, eliminating the need for users to familiarize themselves with another UI.

AccuRoute offers a database connector, which lets administrators establish rules-based workflows that can automatically route scanned documents into SQL or Access databases. This complicated but highly flexible connector allows administrators to define a series of fields in the database that will be automatically populated with data every time a document scanned on AccuRoute is sent to the database. The resulting searchable database provides organizations with a powerful tool for archiving documents for business processes or compliance purposes.



Product Profile

Product: AccuRoute 2.1 — Legal Platform.

Software Developer: Omtool, Ltd., Salem, NH.

Test Configuration: BLI reviewed AccuRoute on a Xerox WorkCentre Pro 128 MFP and a Hewlett-Packard scanner, with plug-ins for iManage.

Supported Devices: Multifunctional products and scanners with a network interface card that support scanning to folders.

Suggested Retail Price: \$14,000 for a single-server license and 200 user licenses. AccuRoute Legal Platform includes two Connectors, but does not support fax server functionality. Additional Connectors can be purchased if required.

Additional User Access Licenses:

10 Users	\$750
50 Users	\$3,000
100 Users	\$4,500
250 Users	\$8,750
500 Users	\$15,000
1,000 Users	\$25,000

Optional Connectors: Prices range from \$1,500 to \$5,000.

Programming Languages: C++.

What We Thought



AccuRoute Legal Platform is an ideal solution for large firms that support enterprise-level document management systems and scan large volumes of paper documents into backend systems via MFPs or scanners. It also performs well as a solution for scanning documents to network folders and e-mail destinations. BLI reviewed AccuRoute on a Hewlett-Packard scanner and a Xerox WorkCentre Pro 128 MFP and found that the product integrated seamlessly with iManage.

The solution is compatible with any and all scanning devices that can scan to network folders. This flexibility is one of the solution's greatest strengths. Another is the fact that it can support an unlimited number of devices without the need to download firmware onto MFPs, plug additional hardware into scanners or purchase additional licenses for every MFP in a given organization. This minimizes both the integration issues and per-device licensing costs that are often involved with other solutions. The solution scales effortlessly: when



What We Thought *(cont)*

an organization expands, it simply purchases additional AccuRoute user licenses.

The AccuRoute Desktop Client and the system's reliance on routing sheets/embedded directives enables end users to create new workflows whenever they are needed, without relying on administrators to establish pre-set workflows. Moreover, an unlimited number of routing sheets/embedded directives can be saved on the AccuRoute server and shared with the rest of the organization. Users may choose to make their workflows public or private, and can set "expiration dates" on workflows, ensuring that the server doesn't get clogged with out-of-date embedded directives.

AccuRoute installation is more complicated than other scan routing solutions BLI has reviewed. While an experienced IT professional can handle the solution's installation, Omtool doesn't recommend that customers install AccuRoute unassisted. The company says that installation by their technicians takes two days, with the first day dedicated to installing and setting up the AccuRoute server and the desktop client software, and the second day set aside for system administrator training. Omtool charges \$1,500 a day for setup and installation, including onsite training for system administrators. The company also offers a three-day, in-depth training course for systems administrators for \$3,500.

The complexity of setup procedures depends upon both the number and type of Connectors a user chooses to include. After setting up the server architecture and the basic mandatory Connectors, users can choose from more than 30 optional Connectors that add functionality, but also demand more effort when setting up the solution. There are optional Connectors that add more control over the solution from the MFPs control panel for Xerox Document Centre and WorkCentre MFPs, and HP DigitalSender scanners.

Omtool offers a selection of service plans for customers to choose from: Advantage, Advantage Plus and Advantage Enterprise. All three levels of support have access to Omtool's 24-hour support customer hotline, as well as access to software patches and service packs, and an online Knowledge Base at www.Omtool.com. Advantage Plus and Enterprise Support customers also enjoy weekend phone support. Omtool says it answers telephone customer support inquiries with a delayed response time outside of normal business hours. In addition, Advantage Enterprise customers benefit from their own dedicated support engineer, who maintains a "pro-active relationship" with the customer and aids him or her with software integration and managing larger AccuRoute deployments.

AccuRoute's clustering feature protects users from downtime caused by a server failure. Essentially a server failover system, clustering provides an automated transition from the primary server to a back-up server. This ensures that there is no downtime when a server goes offline. For AccuRoute, clustering requires a minimum of three servers: a primary server that works under normal conditions, a secondary server that assumes the workload when the primary server is offline, and a database server that stores databases and server configuration files. AccuRoute is designed to work with existing SQL servers, if available. When the primary server goes offline for more than 45 seconds, AccuRoute immediately switches to the secondary server, limiting downtime to a maximum of minutes. The secondary server handles the workload until the primary server comes back online.

BLI has no hesitation recommending this solution to organizations looking for a flexible, highly scalable solution that acts as an entry point for a large document management system. AccuRoute is backed by a respected, well-established software company with years of experience. Of course, when it comes to buying software, the key is choosing the best solution for



your needs and selecting a dealer who listens to your problems, looks at your company's present and future direction, and commits to working with you as a long-term partner.

Ease of Integration ★★★★★

AccuRoute integrates with a variety of document and records management applications, via Connectors that Omtool has developed in conjunction with a number of third-party developers. The Connectors enable native, API-level integration with a variety of document management programs including Summation, Dataflight SW Concordance, Ringtail, Interwoven WorkSite, Hummingbird DM 5.1, Hummingbird PowerDOCS, Hummingbird DOCS Open, World Software Worldox, Xerox DocuShare, Hyland OnBase, EMC Documentum and Microsoft SharePoint. Compatible records management software systems include Hummingbird LegalKEY, AccuTrac 8.0/XE, Tower Software and TRIM Context.

Omtool has developed a variety of Connectors that enable the solution to integrate with many other third-party applications and servers. Some highlights include a database Connector that enables AccuRoute to route messages directly to an Access or SQL database. AccuRoute saves certain information about each message in the database, including sender and recipient information, as well as the message file itself. An Exchange Connector enables the Omtool server and a Microsoft Exchange server to communicate with each other, allowing AccuRoute users to send and receive fax messages with Outlook. The Notes Connector facilitates communication between the Omtool server and a Lotus Domino 5.x or 6.x server. When this Connector is installed, users can send and receive fax messages with a Notes 5.x or 6.x client.

Compatibility ★★★★★

There are two main types of solutions: those produced by OEMs that generally run on a single brand of MFP and those created by independent software developers that run on a vari-

ety of different devices. AccuRoute is among the latter. AccuRoute is compatible with all networked devices with scan-to-folder functionality or scan-to-e-mail functionality.

AccuRoute can run on a shared Windows 2000 or 2003 server. While these servers are dominant in the business world, some competing applications run on other operating systems, such as Linux, which can offer more flexibility.

Upgrade Path ★★★★★

Each AccuRoute server can work with an unlimited number of MFPs or scanners. Since access to AccuRoute is limited only by the number of user licenses purchased, the solution is extremely scalable and can be easily upgraded by adding additional licenses.

Omtool offers quarterly service packs for AccuRoute and releases a new version update annually. The most recent version update of the solution, including AccuRoute Server 2.1 and AccuRoute Client 2.1, expands the functionality of the product incrementally. New features in this update include an enhanced user interface with additional customization options, the AccuRoute PDF printer and watch folders.

Security ★★★★★☆

Login and authentication procedures for AccuRoute are covered by Microsoft Active Directory, which manages users' credentials for applications running on the server.

AccuRoute itself has a basic authentication scheme, under which users are assigned a user name and password for the system. If the application is set up to require authentication, users must enter their user name and password to access the solution.

The solution features 128-bit SSL data encryption for all communications between an MFP or scanner and the AccuRoute server, enabling organizations to comply with government regulations such as Sarbanes-Oxley and HIPAA.



Documentation

★★★★☆

Omtool's clear and comprehensive documentation consists of a 452-page searchable PDF Administrator's Guide, a 66-page User Guide and a one-page QuickStart Guide. The guides are well-written, assume no prior knowledge of the solution and feature large color screenshots

and step-by-step instructions that are easy to follow. All of the documentation is also available online.

Global Business Readiness

★★★★☆

Omtool has an overseas presence with an office in London and a channel partner in Canada.

Company Profile



Software Developer: Omtool, Ltd., Salem, NH.

Status: Omtool is a public traded company, listed on NASDAQ (OMTL).

Founded: 1991.

2004 Revenues: Total worldwide revenues (including US): \$14,790,194.

Employees: United States: 88. Worldwide: 10.

Availability: Omtool products are available in the USA, Europe and Canada.

Major US Brands: Omtool.

Distribution: AccuRoute is sold direct by Omtool and through industry partners.

Large clients: Kirkpatrick & Lockheart, Baker & McKenzie, Stikeman Elliott, Brown Rudnick, Baker & Hostetler.

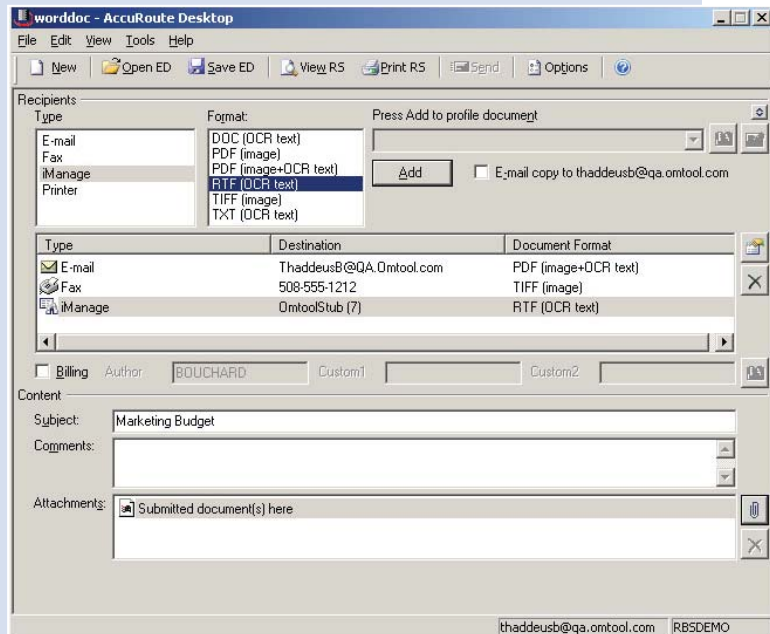


Ease of Use

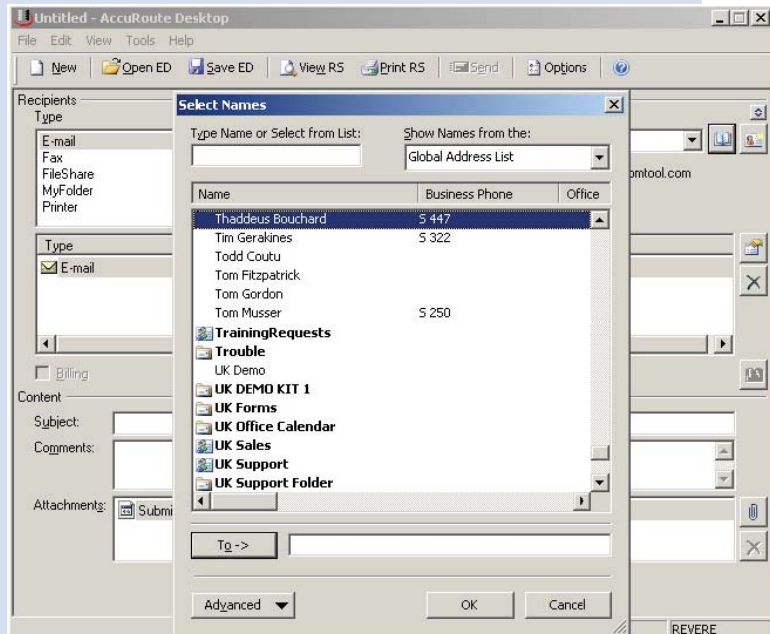


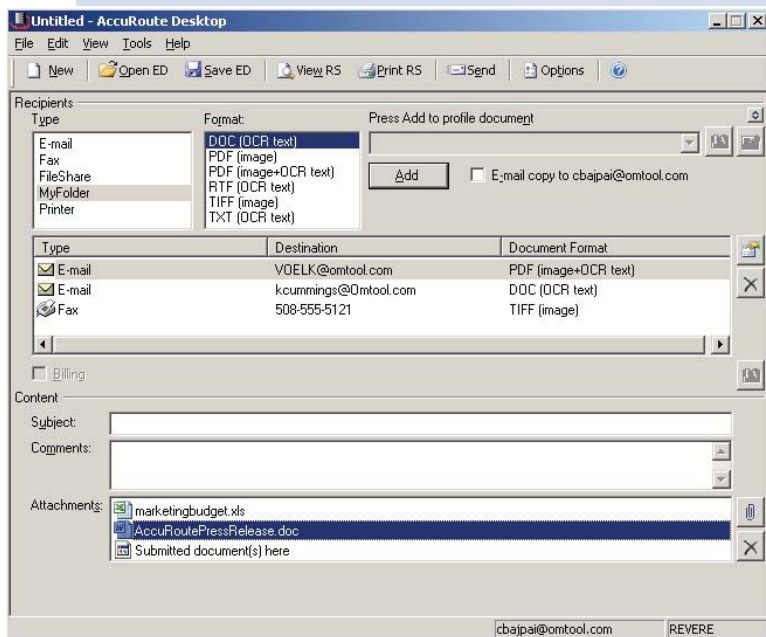
The steps below illustrate how to create a routing sheet using the AccuRoute Desktop Client.

1. The AccuRoute Desktop Client is used to create the routing sheets that send scanned documents to their final destinations. Users open the Client on their PC, and under "Recipients" chose one or more destinations for the document, such as fax numbers, e-mail addresses or back-end systems, and the file format for the resulting electronic file.

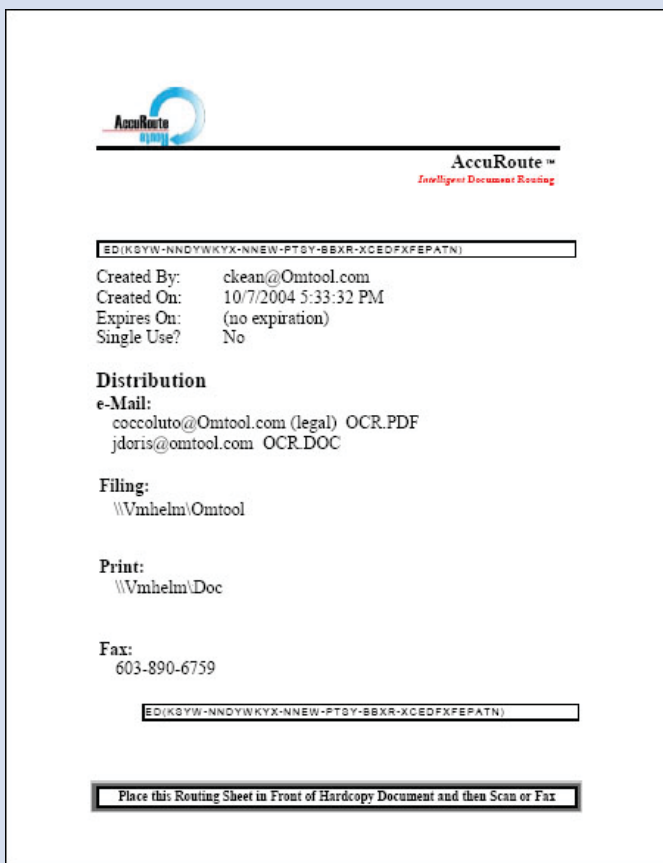


2. AccuRoute is fully integrated with LDAP directory servers, allowing users to quickly and easily add recipients to an outgoing scan.





3. The Client allows users to add a subject and a brief message to outgoing transmissions. Users may also attach existing electronic documents to the outgoing message, in the attachments pane.



4. After customizing the routing sheet, users print out a version that is scanned with their hard-copy documents. The routing sheet and its embedded directive (a code that identifies the unique workflow on each routing sheet) may be saved on the AccuRoute Server for reuse or discarded at this point.



The Market

The copier industry has changed considerably over the past few years as standalone analog devices have been replaced by digital MFPs with networking capabilities. This has resulted in a dramatic decrease in distribution costs as more documents are sent electronically over the Internet, instead of by fax and overnight mail.

According to the Association for Information and Image Management (AIIM), document management has become a critical issue for business over the last two years. "We are at the early stage of a massive revolution in the way businesses manage information, considering both the input side of forms and documents and the benefits of electronic administration," said AIIM's president, John Mancini. "Growth in the enterprise content management space will be driven by large and mid-sized companies who move away from departmental information silos and towards a true enterprise-wide approach to managing their information. Such companies are recognizing the need to capture a broader range of content, including paper documents, e-mails, faxes, web pages and other sources of information."

A study conducted by The Delphi Group, a Perot Systems company, found that 90 percent of typical office tasks still revolve around paper gathering and distributing, and that while 15 percent of all paper handled is lost, 30 percent of employees' time is used trying to find these lost documents. Companies on average spend \$25,000 to fill a typical four-drawer file cabinet, \$2,000 to maintain it each year, and over its life, a single piece of paper costs an average of \$30. Software solutions, including scan routing and document management systems, can dramatically reduce these costs.

The business world is just starting to take advantage of these new technologies, with law and medicine leading the way. The legal market handles great volumes of paper and is very sensitive about billing issues. Lawyers have realized that a well-designed solution can improve their bottom line by enabling them to more efficiently

handle documents without additional staff. The traditional method of manually routing paper is labor intensive, time consuming and inefficient. Being able to access all of the documents needed for a case electronically reduces print bills, enhances distribution (particularly to remote locations) and ensures that all relevant documents are available in a timely manner.

When it comes to hospitals and medicine, having immediate access to the right documents is even more critical because lives could be at stake. There are several advantages to electronic documents in medical situations, including the ability for multiple doctors to view a file simultaneously, a dramatic reduction in misfiled documents and immediate access to files (nothing is ever in transit).

Along with better access to documents, security and privacy are other issues organizations must face. Regulations such as HIPAA and Sarbanes-Oxley are forcing businesses to look at ways to improve security, increase efficiency and reduce costs. Scanning and document management are two areas where major changes are now occurring.

Smart dealers are using solutions to differentiate themselves from the competition. Solutions encourage customers to stick with a particular dealership when the dealer treats the relationship as a long-term partnership. Many dealers are taking responsibility for other areas of a clients' IT infrastructure. This can involve hiring network engineers and building an entire support organization that not only maintains MFP and server hardware, but also supports both front-end and back-end applications.

According to Harvey Spencer, president of Harvey Spencer Associates, worldwide shipments of document capture software grew by 15 percent in the first quarter of 2005 over the same quarter in 2004. The document-capture consulting and analyst company reports that software sales revenue for the quarter amounted to \$211 million (based on end-user prices).



Market research firm IDC predicts that 67 percent of MFPs will be scan-enabled by the end of 2008, up from 42 percent in 2002. While scan to e-mail is currently the most common use for scan-enabled MFPs, IDC says 63 percent of companies with scanning operations feel that document scanning in offices and distributed

work environments is critical. In addition, IDC found that 72 percent of medium-size and large companies with scanning operations agree that "paper-to-digital conversion processes must be integrated into back-end systems such as databases, ERP systems, and document/content management systems."

The Competition

As in most industries, competition is intense with no one vendor offering the best solution. All MFP manufacturers offer their own scan routing solutions and many support several third-party offerings. This competition includes Ricoh's GlobalScan, Xerox's SMARTsend and FlowPort, Canon's Universal Send and HP's Digital Sending technology. Competition from solutions vendors include eCopy's ScanStation and ShareScan OP, NSI's AutoStore, Kofax's Ascent and Capiro.

"eCopy and NSI's AutoStore are the two competitors we see most often in the scan routing area," said Thaddeus Bouchard, Omtool's chief technology officer. "But at its heart, AccuRoute is not about scan routing. It's really about moving and managing information. We believe that the greatest potential for our product is in managing the flow of electronic documents within organizations."



Product Information

Product: AccuRoute 2.1 — Legal Platform.

Developer: Omtool, Ltd., Salem, NH.

Operating Environments: Windows 2000, 2003 Server.

File Formats: PDF, searchable PDF, TIFF, JPEG, DOC, RTF and TXT.

Output Resolution: Depends on imaging hardware.

Minimum System Requirements: 2 GHz Pentium 4, 1-GB RAM, 40-GB hard drive.

Recommended System Requirements: 3 GHz Pentium 4, 1-GB RAM, 40-GB hard drive.

Document Cleanup: Cleanup tools are included with AccuRoute; the system automatically carries out PDF and TIFF image standardization and compression. AccuRoute uses ScanSoft's OCR engine.

Integration: AccuRoute integrates with a variety of document management systems via Connectors developed by Omtool. Compatible document management systems include Interwoven WorkSite, Hummingbird DM 5.1, Hummingbird PowerDOCS, Hummingbird DOCS Open, World Software Worldox, Xerox DocuShare, Hyland OnBase, EMC Documentum, Microsoft SharePoint. Compatible records management systems include Hummingbird LegalKey, AccuTrac 8.0/XE, Tower Software and TRIM Context.

Image Size: The size of each scanned page depends on the scanned resolution and format (PDF, TIFF, etc.). AccuRoute uses JBIG2 compression for monochrome scans and JPEG compression for color scans; the color scans BLI saw ranged in size from a 300 KB to 1 MB.

Service: Omtool offers three levels of service support: Advantage, Advantage Plus and Advantage Enterprise. Service contracts start at 20 percent of the base price, but depend on the level of support required. Customers can choose support coverage that is accessible 24 hours a day, Monday through Friday, or for an additional cost, service that is available seven days a week, 24 hours a day. Assistance is provided via e-mail, fax or WebEx.

Advantage Support includes e-mail support, access to the online Omtool Knowledge Base, round-the-clock phone support Monday through Friday and software maintenance releases. Advantage is priced at 20 percent of the product's list price.

Advantage Plus Support includes e-mail support, access to the on-line Omtool Knowledge Base, round-the-clock phone support seven days a week, software maintenance releases and hardware exchanges. Advantage Plus is priced at 30 percent of the product's list price.

Enterprise Support includes a dedicated support representative, priority access to the engineering department, extra enterprise deployment support, API and developer support, e-mail support, access to the on-line Omtool Knowledge Base, round-the-clock phone support seven days a week, software maintenance releases and hardware exchanges. Enterprise Support is priced at 30 percent of the product's list price, plus \$25,000.



Product Support

Many companies offer great solutions but fail miserably when it comes to product support. Omtool is not one of these companies. Our calls to the support hotline were answered promptly. We were especially impressed with the fact that, even in the Internet age when many companies are trying to migrate their clients to less-costly, Web-based support options, Omtool continues to offer several toll-free telephone support options to customers under contract.

Omtool's call center handles Level 1, 2 and 3 support. Level 1 problems are general how-to questions, Level 2 issues deal with advanced features or problems and Level 3 issues generally require research and investigation. It operates 24 hours a day, seven days a week; Advantage Support customers have access to customer support Monday through Friday, while Advantage Support Plus and Enterprise Support customers have access seven days a week. BLI feels the company offers excellent support to both its dealers and end users.

Dealer Training and Support ★★★★★

Omtool sells AccuRoute direct and through a dealer channel. The company says it trains dealers to sell and support the solution. Dealers are required to have trained network engineers on staff and demonstrate the ability to install, set up and support solutions.

Customer Training and Support ★★★★★

BLI called Omtool's customer support number repeatedly and obtained a live person every time we called. We were never placed on hold or sent to voicemail. The support representatives record each service request and forward this to the appropriate person. The technical support person then returns this call within the period specified in the service support contract. The users BLI spoke to said it was extremely rare for a return call to take more than two hours, and, with critical system down issues, the response is immediate.

AccuRoute users are given many technical support options including telephone, onsite and Web-based support options. After the initial setup and learning period, an organization's internal support personnel should be able to handle most user inquiries. Omtool said its support hotline receives very few customer calls.

Omtool trains its customers' system administrators when installing the solution at the customer's site, while administrators train the end users. The company says it takes less than an hour to learn the basics of AccuRoute and that administrators should have no problems instructing staff on using the solution. Extended training sessions at Omtool's facilities are available for an additional fee.



The Future

Sales Partners

Omtool sells AccuRoute via a direct sales channel, a strategic business partner channel and a dealer channel. Omtool's strategic business partners include OEMs like Xerox, Ricoh and Canon, and legal support services such as Williams Lee, Pitney Bowes, Document Technologies, Inc. and Merrill Corporation.

The OEMs offer Omtool as an option on contracts handled through their direct sales divisions. In this area, Omtool is generally competing against OEMs' scan routing solutions, which include Ricoh's GlobalScan and Canon's Universal Send.

Legal support services companies offer law firms one-stop shopping for consulting, project management, training and document production. These companies sell a comprehensive portfolio of solutions and services including imaging, coding, Web repositories, digital records conversion, records management, print/copy/fax management, high-volume printing and exhibit design. Omtool is one product offered by these companies.

Users

Multifunctional products have become ubiquitous over the past few years as prices have fallen to the point where even the smallest company can afford to purchase at least one device. Despite the widespread deployment of these machines, and the huge productivity improvements they offer, very few users are currently taking full advantage of all of their advanced functions.

While this is beginning to change, there are several reasons why this has taken time. The

first was the inability of dealers to offer comprehensive solutions support. Dealers are getting better in this area, as both software vendors and OEMs improve their training programs, offer better support options and begin to aggressively market their products.

Cost has been another obstacle. In the past, many solutions were difficult to implement and required expensive hardware and proprietary back-office applications. AccuRoute is easy to install and simple to operate once it is up and running.

Omtool

AccuRoute is Omtool's flagship product, the fruit of a decade's worth of experience developing fax and document routing tools. Building on the success of its Genifax and Genidocs products, AccuRoute's predecessors, Omtool has tailored this product to meet the demands of its customers, and is well positioned to continue meeting their needs in the future. The latest version of the software, AccuRoute 2.1, offers several improvements.

Omtool's vertical marketing strategy concentrates on specific market segments. For the last several years, it has focused on selling to law firms. Omtool has sold AccuRoute to about 100 large installations, of which 90 are to law firms. Omtool is now broadening its marketing focus to cover financial services firms and is in the process of closing several large contracts in this arena.

If AccuRoute is to replicate its success with the legal industry, Omtool must ensure that it can adapt itself to the stringent demands of the corporate environment.



Eight Questions to Ask Your Dealer

- ☑ Ask how long the dealer has been in business and how long it has been selling and supporting software solutions.
- ☑ Ask the dealer about its support staff and their qualifications. Ask if staff attend regular manufacturer and industry training sessions. Ask when staff last attended a training course. Determine what current and future training they will give your staff and how much this will cost.
- ☑ Ask the dealer how it supports the solution. A large dealer may have a team of professionals who man a telephone support desk. A small dealer may have a small team that offers personal service. Make sure you have confidence in the dealer's ability to support the product. Call customer support before you buy and see how long you are on hold.
- ☑ Ask how many installations the dealer has sold and find out when the first system was installed. Ask if that first customer is still a client.
- ☑ Ask if you may speak with existing clients and question them about support. If the dealer won't let you talk to its clients, exercise caution.
- ☑ Determine your document management needs and see how well the dealer listens. Ask the sales person what they see as the problem and ensure that you're both on the same page. Get the sales rep to explain the solution simply (no techno geek) and ensure that the solution being proposed solves your problem.
- ☑ What is the return on investment? Ask how long the system will take to pay for itself. Ask how it will improve your productivity and reduce the number of documents you need to print.
- ☑ Ask the dealer when it is holding a manufacturer day. Many solution providers send staff members to dealers upon request so potential buyers can talk to the solution provider and find out its plans for the future.



How AccuRoute is Sold

To see how AccuRoute is being sold, BLI spoke to Omtool and two dealers: CPI, a Jacksonville, FL, reseller with six employees and revenues of almost \$2 million; and Document Technologies, Inc, an Atlanta-based national document and technology solutions provider with 1,100 employees.

"We use a combination of direct sales and dealers to sell our products," said James Scharpf, Omtool's executive VP of sales. "Omtool is expanding and we believe that the best way to stimulate the market is for us to generate brand recognition and to direct inquiries to resellers whenever possible.

"While only about one third of AccuRoute's sales are now generated by resellers, we expect this to increase to 50 percent by the end of the year. Direct sales will remain important for end-user demand creation, but the channel is our long-term strategy as we are currently doubling the size of our channel sales force."

Scharpf said resellers are crucial to the company's future success because they have insights into local markets that Omtool could never hope to duplicate. "If there's ever a conflict between one of our sales reps and a reseller, we always pass the sale on to the reseller," he said. "I cannot think of a single example of us ever taking a sale from a reseller."

Dan Baugh, CPI's president, echoed Scharpf's comments and said Omtool was the perfect product for resellers to promote because the company was 100 percent behind all its dealers.

"Even though they sell direct, they never compete for a client," he said. "In fact, they get behind us every time and do everything possible to ensure that we win the sale."

Rachel Weseman, CPI's technical support manager, said she was impressed with AccuRoute. "Like most companies, our salespeople do

everything possible to win a sale," she said. "Since Accurate is so versatile, they never have to over-promise or make extravagant claims about productivity improvements, ease of use, or what the product can do.

Baugh said saving money and improving efficiencies is the major reason that companies buy AccuRoute. "When a company installs AccuRoute, they can replace 100 analog telephone lines with 24 digital lines," he said. "This leads to a significant reduction in telecommunications costs, and a major productivity boost, as workers no longer have to get up from their desk to send or receive a fax."

Mark Beeney, national facilities management technology manager for Document Technologies, Inc., said his company sold a lot of solutions to lawyers. According to Beeney, the key to succeeding in this market is providing clients with the best available technologies to improve their productivity.

"Attorneys don't like technology," said Beeney. "They need a solution that looks and works like paper, but lets them leverage the full power of their existing back-end systems. AccuRoute does that and enables users to modify it to fit in with their existing workflow by enabling and disabling certain features.

"When I do a presentation, everyone is impressed with how easy AccuRoute is to use. Because attorneys are very conservative, they will not implement any brand new technologies. This gives Omtool a distinct advantage over many other solutions because it has a proven track record."

Beeney said law firms are careful with how they spend money and demand a fast return on investment. Trying to calculate ROI is difficult because there are many intangibles.

"One of our clients obtained an ROI within the first month," he said. "Another took three



months. Most take between six months and a year. Because it is so fast, potential clients would find it hard to believe that it was possible to achieve this sort of ROI with a single solution. As a result, I never promise a specific ROI, but instead reference a few clients and show how they benefited from AccuRoute.”

Baugh said his goal was to identify what the client wants to achieve, and to deliver a product that meets or exceeds these demands – both now and in the future. “I spend a lot of time researching these needs before we submit a

bid,” he said. “While doing this work upfront takes time, it pays off in the long run because we close on 80 to 85 percent of the projects we bid on.

“While our close rate is important, the most important factor is having a client who is happy with the installed solution. If employees start using the solution early, they achieve the expected productivity gains quickly. This not only ensures us a client for life, it gets us plenty of referrals. This makes it easy to build a successful business,” he said.

AccuRoute Boosts Productivity and Improves Efficiency at Law Firm

“We installed a scan-routing solution because we wanted to improve service to our clients and make life easier for our attorneys,” said Shawn Fain, director of technology at Sprouse Shrader Smith PC, a law firm in Amarillo, Texas, with 40 attorneys.

“While we also wanted to reduce costs, we didn’t do an ROI study on AccuRoute because our main focus was reducing the amount of time our staff spend on mundane tasks such as filing and retrieving documents and giving our attorneys better access to the information they need to do their jobs.”

Fain has been with Sprouse Shrader Smith for more than 10 years and says he is responsible for most of the technology the firm has purchased during his tenure. As a result, he has a good idea about what sort of technology the firm’s lawyers like, and, most importantly, will adopt.

“There is no point purchasing a great solution if the staff won’t use it,” he said. “Attorneys love paper and hate technology. As a result, I only looked at solutions that were easy to use and allowed our lawyers to handle electronic documents the same way they handle paper. These meant that the solution had to have a simple desktop interface and very few buttons on the MFP.”

Sprouse examined several applications in late 2004 and quickly narrowed the choice down to two solutions. One of the firm’s biggest requirements was that it be hardware agnostic because it did not want to be tied to a specific MFP vendor. Currently the firm has four Canon MFPs, and one Canon, HP and Fujitsu scanner. It also uses the Interwoven to manage its documents.



"I've installed a number of applications, and no matter how well the installation goes," there are always issues," said Fain. "As a result, I allocated two weeks for AccuRoute. One of the reasons I allocated so much time is because I planned to install the system myself, with the help of an assistant, because we wanted to keep our costs down."

While Omtool says that some companies do take this route, it prefers to have a dealer install the solution, or handle the installation itself, because issues and conflicts often occur. To make the installation as simple as possible, Fain advised Omtool of his plans and devised a plan that enabled the company to respond quickly to any issues that arose.

"Omtool was great," said Fain. "After they realized that I was going to install it myself, they did their best to prepare me. This included a WebEx and a lot of telephone guidance. Needless to say, it went exceptionally well and I think even Omtool was surprised at how straightforward it was.

"I was impressed with both the company's documentation and how good their phone support was. I had a dedicated support engineer who responded immediately to my requests for help. He was so good at getting back to me, I panicked if it took more than two hours to get a response."

Fain said Omtool's excellent service has continued to this day; and every time he phones the company he gets a live person. He said that while it is not possible to get an immediate resolution to every problem, he always gets a response and is never left hanging for days while the company investigates.

"They're very good at staying in touch while they work on your problem," Fain said. "I wish that every company I dealt with offered support as good as Omtool."

The key to a good system is user acceptance and use. This is especially crucial in a law firm where attorneys use paper to record everything. Lawyers are naturally cautious people, so they need constant reassurance when they are forced to change the way they handle specific tasks.

"I was surprised at how quickly attorneys and their assistants adopted AccuRoute," said Fain. "There were many reasons for this, but I think the biggest was because it was so easy to use.

"When we first installed the solution, we gave two-hour training classes. This was overkill to say the least, because staff only needed a few minutes to work out how AccuRoute works because it's so intuitive. Most of the class time was spent explaining our procedures, since this as the ideal time to standardize many of our procedures."

Using the system is simple. If a person needs to route a document to a predefined workflow, they simply print out a routing sheet that lists all the tasks required, (e-mail and/or fax the document to specific recipients, route to a specific folder in an application, etc.) and place this page in front of the documents that are being scanned. If a new workflow needs to be created, this is generally done at a person's desktop with the AccuRoute Client.



“Staff love AccuRoute because it doesn’t change the way they do their job, it simply enables them to handle multiple tasks simultaneously,” Fain said. “They still use the photocopier the same way, they just put a routing sheet in front of their documents and the images are automatically sent to multiple locations at the same time.”

AccuRoute’s advantages include automatic confirmation that a fax or e-mail has been sent, and the ability to place security on documents to prevent unauthorized people from accessing the important data.

“When we installed AccuRoute our goal was to improve efficiency,” said Fain. “We have achieved this in several areas. One of the biggest productivity boosts has been in communications. Because many of our new documents are available electronically, staff can fax or e-mail documents directly from their desktops. This has reduced the amount of pages that we need to print, and cut our fax bill.

“While documents can be saved in a variety of formats, most of our staff use PDFs because they are so versatile. PDFs offer all the advantages of paper in that they can be easily printed, but since they are electronic, they can also be searched and easily routed to multiple locations.

While the firm is currently using AccuRoute only for new cases, one of the reasons it purchased the solution was to make it possible to convert all their old documents without specialized staff or the need to send documents offsite for a major backfile conversion.

“While I would love to go paperless in the future, I don’t think this is likely to happen anytime soon,” said Fain. “Lawyers love paper and that’s not going to change.”

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