

Reduce Paper; Save More than \$1 Million

UK Firm Creates an Integrated Routing and Document Management System

By Thaddeus Bouchard, CTO, Omtool, Ltd.

With more than 500 fee-earners in 12 practice groups, cost-control and productivity have been critical concerns for Taylor Wessing LLP, a UK top-20 law firm specializing in intellectual property law. Recognizing that the pervasiveness of paper documents represented a large hidden cost, Tim Hyman, IT director, embarked on an ambitious program to transform how documents flowed through the organization.

"To create an environment that is less paper-intensive, we implemented a broad portfolio of technology from Autonomy iManage (formerly Interwoven) that enables our professionals to store, access and share a complete range of documents," Hyman said. "That was a crucial first step, but we felt we could extend the value of the implementation even further by streamlining our entire document lifecycle. We wanted to ensure that we had everything in electronic form—including our paper-based documents."

With more than 20,000 linear feet of filing capacity (that was 84% full) in one of London's priciest business districts, on-site paper records were a budget-killing expense. A planned relocation to new premises presented an ideal opportunity to accelerate the move from paper to electronic formats and avoid moving millions of documents.

Handling Paper Efficiently

Tim Hyman and his staff sought a solution to integrate paper with its document and records management systems. Driving the mission to create a comprehensive "e-file" environment, they wanted to implement a strategy to address both the "people aspects" and the underlying technology requirements. Their vision encompassed behavioral changes, working procedures, technology adoption and more.

"We wanted a single, complete, up-to-date workspace that contains all relevant information," said Hyman. "That includes

email, electronic documents, voicemail and scanned hardcopy documents. That workspace then becomes the primary day-to-day interface for all professionals working on a case or project—and access had to be strictly controlled, of course."

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After securing board approval, Tim Hyman and an evaluation team consulted with different departments to collectively devise a few "musts" and "must-nots" for the project:

- ◆ Must be easy to file documents;
- ◆ Must be easy to search, locate and retrieve documents;
- ◆ Must be easy to access remotely;
- ◆ Must provide easy access to paper records;
- ◆ Must not take longer than paper filing; and
- ◆ Must not significantly add to secretarial workload.

After completing a thorough review of commercial solutions for document capture—and ensuring that the alternatives tightly integrated with their existing Autonomy iManage technology, Taylor Wessing selected Omtool's AccuRoute solution to streamline its document cycle by capturing, processing and distributing its paper and electronic documents using standard multifunction printers (MFPs).

To capture and route hardcopy documents, the user defines scanning instructions and destinations from his desktop PC. AccuRoute translates those instructions

into bar-coded routing rules that are printed onto an "intelligent routing sheet" (much like a cover sheet) and placed on top of the document stack before it is scanned through an MFP. The server "reads" those instructions to identify the delivery specifications, process the document and deliver the content in the required formats.

Those routing instructions can contain several steps for distributing documents simultaneously, such as emailing, faxing and archiving a document into most electronic information systems while also translating the scanned information into the required format(s) such as a text-searchable PDF and/or a Microsoft Word file.

"Our people simply create a routing sheet—which is reusable—and scan their documents and route them back to their own computers, network folders or directly into Autonomy iManage WorkSite," Hyman explained. "We also created a drag-and-drop method for filing documents, so they only need to drag a document into a specific folder on their computer desktop. If they have a large volume, we have office personnel bulk-scan multiple jobs for them, too.

"We've even set up our system to let people send email that are automatically filed appropriately in WorkSite—because, after all, Microsoft Outlook is not a records management system." Remote access—including secure access from mobile devices like BlackBerry smartphones—means employees around the world can instantly share vital documents easily and securely.

More Than \$1 Million in Savings

According to Hyman, the new system has delivered tremendous cost-savings—particularly in the context of its corporate office relocation. "We were able to achieve a first-year payback attributable solely to our reduced need for on-site storage of paper records," he said. "As we prepared to move offices, we scanned documents and sent the paper files off-site. We didn't need the same amount of physical storage on-site—and that alone saved us more than \$1 million. And with the cost of office space, we save more money each month in real estate costs. We cut our physical filing from approximately 45 linear feet per fee-earner to just 22, which provided even greater savings."

The new integrated system has also been instrumental in the firm's achieving ISO 14001 compliance for environmental management. Taylor Wessing has minimized its environmental impact while producing a solution that conforms to business continuity requirements of document safekeeping. ■

A 20-year veteran of the software and hardware industry, Thaddeus Bouchard is responsible for directing all aspects of technology, business-process improvement and system development as Omtool's chief technology officer.