Turbocharge Your Information Workflow

Presented by
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Today’s Presenter

Rick Hellers is President & CEO of nQueue, the leading provider of information workflow technology to the legal industry. He is also the Founder and Executive Director of the Association of Legal Technologists (ALT). Rick has more than 35 years’ experience in leadership, technology and operations management for law firms (including two Amlaw 200 firms) legal technology providers and educational associations. He is an expert on law firm technology change management, information workflows and firm economics. Rick is also a former member of the Association of Legal Administrators and a founding member of International Legal Technology Association (ILTA, formerly LawNet) and a frequent speaker and writer on legal technology and management issues.
Today’s Agenda

1. Information Workflows Defined
2. Critical Law Firm Workflows
   a. Scanning and Routing
   b. Print Management
   c. Cost Recovery
   d. Contract Management
3. Change Management
4. Questions & Answers

What are Information Workflows?

1. Law firms are increasingly focused on profitability and risk management, while clients are pushing for efficiency and cost reduction.
2. Workflows can be the key
   • Streamlining process and procedures
   • Creating uniformity, and consistency within the office
   • Reducing overhead
   • Minimizing risk
3. People, Procedures Policy, Process… all supported by Technology
Set objectives

✓ Reduce or Eliminate Paper?
✓ Comply with Policy?
✓ Reduce Risk?
✓ Increase Attorney Productivity?
✓ Reduce or Redeploy Staff?
✓ Increase Firm Profitability?
✓ All of the Above?

Inventory your resources

➢ Current workflows
  ➢ Compare to best practices
➢ Current technology
➢ Current/available staffing
➢ Firm culture and desire for change
  ➢ Including buy-in from firm leadership
➢ Budget
100% of firms surveyed say that they would benefit from more scanning

- Minimizes paper
- Reduces offsite and onsite storage costs
- Security and disaster recovery
- Improves firm productivity
  - Documents become searchable and findable

Scanning and Routing – Best Practices

- Scan easily from anywhere
  - MFD, copy center or desktop
- Speed and accuracy of OCR
- Format properly (file type, resolution)
- Route automatically
  - DMS is best
  - Email inbox, network folder, desktop
Print Management – Value Prop

➢ Improves client confidentiality
➢ Reduces usage and waste
   ➢ Including unnecessary color, inefficient device, etc.
➢ Tracks resource usage
➢ Convenience: print to any device
➢ Cost recovery if desired

Print Management – Best Practices

➢ Hold print job until user authenticates at the device
   ➢ Docs don’t sit in print trays “out in the open”
➢ Leverage prox id cards
➢ Integrate with practice management system
➢ Set rules to limit unnecessary color, force printing of big jobs to the proper device, copy center, etc.
➢ Guest printing
Cost Recovery – Value Prop
➢ Still a key to firm profitability
➢ Most clients still allow recovery for copies, prints, scans, other expenses
➢ AFAs are on the rise, but large majority of work done on traditional hourly basis
➢ Even the most prominent “AFA-only” firms still use cost recovery tools
➢ Perhaps even more critical when clients push back
➢ Needed to paint full profitability picture
➢ Cost control more critical when firm cannot recover

Cost Recovery – Best Practices
➢ Embed cost recovery software right on devices
➢ Capture all data
➢ Simple user experience
➢ Minimize clicks
➢ Work with any device
➢ Same experience on all devices
➢ Tie directly to time & billing systems
➢ Tie directly to DMS
Contract Management – Value Prop

➢ Firm has thousands of contracts filed away
  ➢ Leases, vendor contracts, technology, employment agreements, etc.
  ➢ Paper and electronic
➢ Even years after the fact, must be able to know about
  ➢ Your compliance with their terms
  ➢ The other parties’ compliance
  ➢ Termination and renewal dates
  ➢ Auto renewals/evergreens
➢ Regulatory compliance, e.g. GDPR

Contract Management – Best Practices

➢ Scan, OCR all paper contracts accurately
➢ Use modern technology to build a database of key terms
  ➢ Start/end date, volume discounts, etc.
➢ Set alerts for key terms, dates
➢ Dashboards for reporting and insights
➢ Identify overlapping agreements, backup vendors, consolidation opportunities
➢ Track vendors’ compliance with GDPR, FCPA, the U.K. Bribery Act or any other regulation
Change Management – The Three R’s

**Risk** – While some see risk from change, there is often more risk from not changing. Consider the "comfort" of paper vs. catastrophic events like hurricanes.

**ROI** – Calculating an ROI is often the quickest path to project approval. Consider hard costs (e.g. offsite storage) as well as soft (e.g. attorney productivity). Your vendor should be able to help you put this together.

**Recalcitrance** – Simplicity and ease of use, as well as training and support, make the difference
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Your opinion matters!

Please take a moment now to complete the evaluation.

Thank You!