Maximizing Your Service Providers
Contracts for Savings and Efficiencies

Presented by
Stephen Cole

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Maximizing your Service Providers: Contracts for Savings and Efficiencies

Mattern & Associates
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Agenda

- Introduction
- BPO and LPO in the Legal Market
- 3rd Party Provider Contracts
  - Office Services
  - Multi-Function Devices and Printers
  - Records & Information Management
  - Electronic Discovery
  - Document Processing/Administrative Resources
  - Off-Site Records Storage
  - Office Supplies
- RFP and Contract Process
- SLAs
Presenter

Stephen Cole, IGP
Director, Client Technology & Strategy

Stephen has over 20 years of experience in general law firm technology, litigation support/ediscovery, Information Governance, back-office operations, and management consulting. He has implemented outsourced solutions at numerous AMLAW 200 firms in the areas of image routing, print, cost recovery, records, document processing and litigation support.

Prior to joining Mattern & Associates, Stephen held positions with a market-leading E-Discovery software provider, an AMLAW 50 firm, as well as 12 years with Pitney Bowes Management Services where he was ultimately responsible for the legal business unit.

Overview

Mattern & Associates helps law firms develop unbiased strategic direction for their business while improving cost-effectiveness and expense recovery.

- Unbiased expertise
- Time management and delegation
- Subject matter experts
- Market knowledge and benchmarking data
- Vendor leverage

Solution-Oriented:

“Mattern was able to show our firm’s position in the industry against the benchmarks.”

Started in 1997
Cost Recovery studies since 2004
Over 300 client projects

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Managed Services Continues to Evolve

▪ “BPO” and “LPO” Buzz
  ➢ Business Process Outsourcing – non-billable-hour activities in the back and middle office
    ▪ Traditional FM Administrative Support
    ▪ Financial activities such as AP
  ➢ Legal Process Outsourcing – billable hour-activities subcontracted by the firm
    ▪ Document Review
    ▪ Legal Research
    ▪ Drafting
▪ Technology (Infrastructure & Software Platforms)

Back Office:
• Copy/Print/Scan
• Mail/Messenger
• Hospitality
• Records Management

Middle Office:
• Litigation Support
• Document Processing
• Library Services
• Accounts Payable
• Administrative Support

The Approach

▪ Review Terms & Conditions in Existing Contracts
  o Term for convenience
  o Obligations
  o Buy-Outs

▪ Create a Competitive Situation
  o Incumbents
  o National providers
  o Regional Providers
The Approach

- Outline Key Terms & Conditions as Part of RFP process
- Standardize on a Core Solution
- Ask for a Vendor-Recommended Solution
- Ensure No Hidden Fees
- Insist on SLAs with Penalties
- Monitor Contracts for Compliance
- Hold Quarterly and Annual Meetings
- Detail the Divorce Process
Your opinion matters!

Please take a moment now to complete the evaluation.

Thank You!