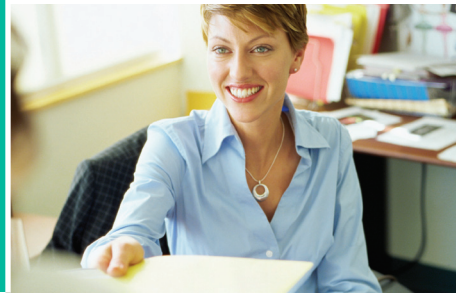


Pitney Bowes helps large law firm consolidate multiple programs

The New York City office of a large national law firm represents clients in a wide range of practice areas, from real estate, financial services, natural resources and technology, to healthcare, advertising, and media and entertainment. Their 450 professionals provide legal and consulting services to a global client base out of eight offices in California, New York, and Washington, DC.

CASE STUDY



Merged firms need merged database

The firm retained Pitney Bowes to consolidate its records, along with those of three other law firms it recently merged with, at its offices in New York City and Albany, NY. The fundamental challenge was organizing and automating documents and records from all four firms into one consistent program with a standardized database.

The records departments and processes of the merged firms were all unique and different, which created problems locating files and documents requested by attorneys and paralegals. Records resided in different databases and the descriptions weren't specific enough to readily find requested items. Typically, a request would be narrowed to a set of about 50 files instead of just one or two that were needed. The records department also had to search through more than one physical location to find files and documents. This resulted in an inefficient records retrieval process that could take anywhere from a few hours to a couple of days.

A challenging implementation

The process of automating the merged firms' files was complicated by attorneys who were accustomed to having multiple files kept manually in their offices and uncomfortable with having their files managed by a central records operation. Also, many of the documents sent to the records department used client matter indexing, which made it difficult to correctly describe them for easy retrieval.

A fully automated solution

Pitney Bowes automated the records departments at both of the firm's New York locations. This was no small job. In the records department alone, more than 2,400 open redwelds needed to be converted and indexed.

Approximately 40 percent of the department's files were contained in the database and approximately 60 percent were not indexed at all. Additional files from the merged firms' databases were either identified on a Word format list or not listed in any database. To create uniformity, Pitney Bowes entered all files/documents into a records management database with fully automated indexing.

Challenge

- Automating documents and records from four merged firms into one consistent, standardized program
- An inefficient and lengthy records retrieval process
- Generating trust among attorneys uncomfortable with having files managed by a central records operation

Solution

- All files now searchable through only one central database and physical location
- Turnaround time for requesting files shortened to within 20 minutes
- Improved operating efficiency resulted in increased productivity and won the attorneys trust

Impressive results

The first conversion was completed ahead of schedule. The New York City and Albany office projects also were completed ahead of time, saving the client more than 20 percent.

Today, the firm's records department only needs to search one database and physical location to locate documents. This improvement in operating efficiency has resulted in increased productivity for the department.

Service from the records department is now rated as exceptional by the firm's staff. Turnaround time for requesting files is less than 20 minutes, and there is no longer a problem with missing files. As a result of these improvements, attorneys now trust and rely on the records department; in fact, the volume of work has doubled.

Pitney Bowes' work was well received by the attorneys and staff, and the company was retained for additional assignments and expanded services.



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