

# Case Study

legal

**RICOH**  
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## Ricoh Makes Premier Law Firm's Information More Mobile—While Lowering Costs and Streamlining Records Management

*The law firm is able to complete the same amount of work with 3.5 fewer staff members and has reduced its costs for document storage by approximately 50 percent—a huge savings.*

### ABOUT THE CUSTOMER

Information is the lifeblood of any law firm. They need information to bring in new clients, conduct legal proceedings, and store and retain client and court record information for years to come.

Many thriving law firms find themselves literally drowning in information. Especially if they don't have the right records management protocols in place.

A premier thriving law firm headquartered in the Pacific Northwest—with offices in seven states and the District of Columbia—was no exception. Records were overflowing for this leader in corporate, energy, environmental, intellectual property, labor and employment, land use and construction, litigation, real estate, renewable energy and technology law. In business for more than 100 years, with a stable of approximately 400 attorneys, the law firm offers a full suite of transactional and litigation solutions for U.S. and international clients.

As the firm continued to grow in size and added more office locations, its management team wanted to assess its record management processes. Already enjoying an existing relationship with Ricoh as its supplier of multifunction printers (MFPs) for its main office, the law firm decided to put Ricoh's reputation for expertise in legal records management to the test.

### CHALLENGE

- Increase records management efficiency
- Reduce storage costs
- Compare current processes to industry best practices
- Establish goals for success

### SOLUTION

- Ricoh legal records management
- In-depth analysis of record management processes
- Site visits, focus groups, interviews, workflow observation & survey
- Detailed recommendation roadmap
- Eliminate redundancies

### RESULTS

- Improved information mobility
- Significant cost reduction
- Enhanced efficiencies
- Reduced records storage, strict retention schedule
- Future digitized intake records
- Ongoing audit to reduce stored files as much as 45 percent

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## CHALLENGE

Topping the list of the law firm's needs—increased efficiency in records management and reducing storage costs. The firm's records management functions were over staffed and money spent on off-site storage seemed excessive. Additionally, the law firm's management team wanted to compare its records management processes to industry best practices.

But first, goals needed to be established before diving into an in-depth analysis of the firm's records management. The firm wanted to improve employee productivity and efficiency, ensure compliance with best practices for document retention, reduce redundant workflow and streamline records storage procedures. In particular, analysis needed to focus on the areas of conflicts of interest, new business intake and general records management with an emphasis on the paper records used in its larger offices.

Topping the list of the law firm's needs—increased efficiency in records management and reducing storage costs.

## SOLUTION

Ricoh stood out as the right partner for the job. The law firm engaged Ricoh's legal consulting team to conduct a thorough analysis of its records and information management processes.

They provided the firm with an eye-opening visual site map that identified all of the different places records were stored—including closets, conference rooms and hallways in addition to the records center.

The Ricoh team conducted an extensive on-site review of the firm's practices and procedures that included site visits, focus groups, one-on-one interviews, workflow observation and an online firm-wide survey. They provided the firm with an eye-opening visual sitemap that identified all of the different places records were stored—including closets, conference rooms and hallways in addition to the records center.

Ricoh also prepared a detailed roadmap of recommendations and best practices that the firm put in place to improve efficiency, reduce costs and enhance the information flow through the organization every day. The roadmap covered observations and recommendations in the areas of records management leadership, processes and standards, labor allocation, training and use of technology in the records workflow. All to drive the highest level of quality in records management while maintaining cost awareness.

A number of Ricoh's recommendations focused on right sizing by removing redundancies in the firm's organizational structure. For example, the firm used to have a destruction specialist dedicated solely to disposing records. On Ricoh's recommendation, the firm moved that person into a disposition coordinator role and then outsourced record destruction to its records storage vendor—making the workflow more streamlined and efficient.

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Similarly, the organization eliminated redundant data entry that had been taking place at various points in the new business intake process. Additional inefficiencies in the client intake and conflicts of interest screening workflows were eliminated as well. Rather than having these functions fall within the responsibilities of the firm's records manager, the intake and conflicts processes are now owned by staff members dedicated to these functions.

## RESULTS

The law firm now has a well-defined system for its records workflow. It is able to complete the same amount of work with 3.5 fewer staff members and the firm has reduced its costs for document storage by approximately 50 percent—a huge savings.

The records and information management recommendations by the Ricoh team has improved mobility of the firm's information, significantly reducing costs and raising efficiencies. In addition, the law firm has reduced its onsite and off-site records storage and implemented a strict retention schedule—eliminating many of the inactive records that the firm had onsite by sending them to off-site storage or if appropriate, to be destroyed.

When that audit is complete, the firm estimates it could reduce the boxes of information it currently stores by as much as 45 percent.

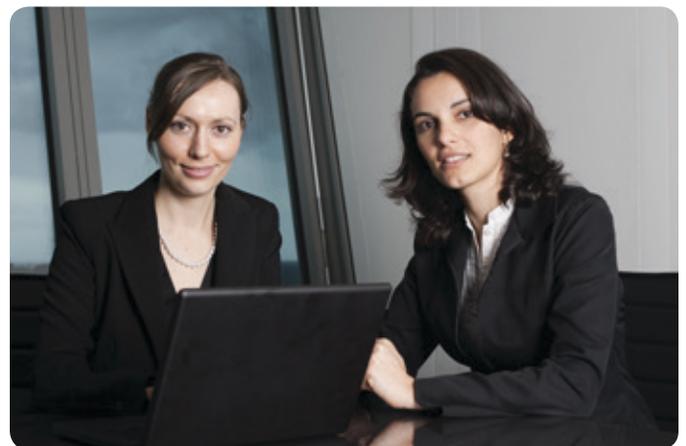
### Exploring Digital Intake, Establishing Records Center

Looking forward, the firm plans to implement additional efficiency solutions with the help of the Ricoh team. In addition to the changes the firm has already made to its intake process, it's looking at digitizing the workflow in an effort to eliminate all of the manual processes currently involved in opening a new matter. Having realized so many benefits from better records management, they are also going to include a state-of-the-art records center in a new headquarters building.

### Reducing Stored Records, Continuing Partnership

The partnership with Ricoh is firmly in place. The law firm is planning to work with Ricoh to audit stored files according to its new retention policy. When that audit is complete, the firm estimates it could reduce the boxes of information it currently stores by as much as 45 percent.

Over the years, Ricoh and the law firm have forged a very close working relationship. Ricoh is now a valuable partner to the firm, bringing seasoned expertise in a number of key areas that support the law firm's needs and recommending best practices that allow the firm to focus on what it does best—devoting itself 100 percent to serving its clients.



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