Oregon State Bar
Sustainable Future Section

Photo: J. Michael Mattingly

Going Paperless: Insights of a Law Firm Chief Operating Officer

By Janis Alexander

Ambrose Law Group LLC, founded more than 20 years ago, is a boutique business, real estate, and finance law firm with offices in the Pearl District in Portland, Oregon, and a branch office in Bend, Oregon.

Technology has always been a very important part of our practice. In the mid 1990s, at the ABA Annual Meeting in San Francisco members of management attended a CLE presented by the Law Practice Management Section entitled “Technology for the Rest of Us,” with veteran attorney speakers who are also technology experts. After meeting with Ross Kodner, an attorney and technology expert from Wisconsin, we got very excited about totally revamping the way our firm did business and moving it to another level in order to better compete with the largest law firms by utilizing technology. Having “top down” buy-in from management and partners was a great advantage because we could do things much faster if they did not need to be convinced.

The Plan. Upon our return to the office, I formed a staff committee (consisting of staff members most excited about this new concept) to start planning what I consider to be the hardest part of this new plan—the implementation and procedures. There were and are so many things to think about, it can be daunting. As we all know, attorneys and staff get very used to doing things the “same way we always have done them,” and can push-back against even the smallest changes. Realize there will be resistance, but nothing good ever comes easy. With the staff’s assistance, we began to develop a plan that would not overwhelm our office and never looked back.

The Technology. After meeting with some excellent computer consultants, we put in place some high-end scanning equipment. We now use a Xerox multi-function machine which prints, copies, and is a high capacity color scanner. We also greatly enlarged our online storage capacity and added a document management system (“DMS”) called Worldox. Worldox is an excellent program that is now extremely popular in small, medium, and large law offices, in part because it is much less expensive than other programs on the market. Now, our attorneys and staff could not live without it.

The Implementation-Figure Out the Issues. Just a few of the issues we faced in this endeavor are as follows (there are many others):

1. Develop intake procedures for data, including mail, voicemail, faxes and email.
2. Determine who is responsible for scanning and profiling documents in the DMS.
3. Identify who you want to organize the electronic file cabinet.
4. Decide whether you are going to keep electronic, hard copies or both.

Electronic Filing Procedures. When moving to this electronic filing system, the first step was figuring out what happens in our office on a “day to day” basis. Our office is structured differently than most law firms. Instead of attorneys being assigned to a particular legal secretary or paralegal, our office works in three teams: (a) Business Team; (b) Real Estate

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Team; and (c) Litigation Team. Several decisions had to be made :

1. What happens with the Mail? In our case, it is opened and sorted and given to the paralegal in charge of the particular matter. That person will then stamp, scan, profile and email to appropriate team members working on the file and it will be filed in the hard copy file, if applicable.

2. What about Email/Voice Mail/Fax In Box Issues? Our office uses a universal in box through Outlook (includes immediate access to voicemail and faxes, as well as email, within Outlook's window). These documents (including email) are not printed for physical files, but rather are filed electronically by those sending or receiving them. Junk faxes are simply deleted, and saved faxes and applicable voicemail are forwarded to other team members via email.

Files, Files, More Files. At this time, we made the decision to move to electronic-only files. In evaluating how to do this, we adopted this approach::

1. We started with a test category (ours was loan documentation files), in which files are pretty standard in each case.

2. It is our procedure to save all files and profile them electronically through our DMS for easy searching, both full text and by several profiles that the user completes when saving each file to the network.

3. We scan and send all original documents back to the client when received from the recorder's office. Why do this? Both we and our clients have the documents when needed, we don't pay to store original paper documents, and the PLF loves it!

At this time, all files in our firm are electronic only with the exception of litigation files and company minute books (although the actual corporate file is all electronic, including an electronic version of the corporate minute book). Moving our litigation files to all electronic files is our next goal so all of our files are electronic only

Closed Paper Files. What happens when the paper files have been closed?

1. Staff reviews a file to make sure it does not contain any original documents while at the same time taking out all paper clips, staples, note pads, etc. for recycling purposes. After doing so, the file is scanned in bulk, by section of file (such as correspondence) and saved and profiled in the electronic file cabinet with all the other client documents, but in a separate electronic folder.

2. Documents are then shredded and staff makes a file maintenance entry in our time/billing software to track files.

3. Why go through the hassle when you can just store the files? (a) To save storage costs, which really add up over long periods of time; and (b) to save costs for office supplies by recycling them, which is good for the environment and your budget.

4. Another great advantage to this system is that there are no storage and retrieval costs or delays because the electronic file is on the network if anyone needs it, including those working outside the office with access to our network. There are no payments to third-party vendors for storage and it really reduces office space needs for storage in file cabinets.

Branch Office. Our firm's branch office in Bend, Oregon, is almost entirely without paper files. Attorneys there access the firm's network files through

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high-speed internet using Citrix technology. This practice requires a much smaller office footprint and reduces overhead.

Sustainability Issues. As stated earlier in this article, our firm started this office concept long before sustainability issues were important to law firms or most of the world. It is a win-win for all. This office concept fits right in with saving the environment by reducing waste and by recycling those few office supplies we actually need to use on a daily basis. And, employees can work from home or anywhere without having to waste gas to come to the office, giving all employees much more flexibility.

Going paperless is a major venture, but our firm would never go back to the way we used to do things. We feel it is the wave of the future in law firms, provided their attorneys and staff members are willing to change old habits.

Janis Alexander is Chief Operations Officer at Ambrose Law Group LLC.