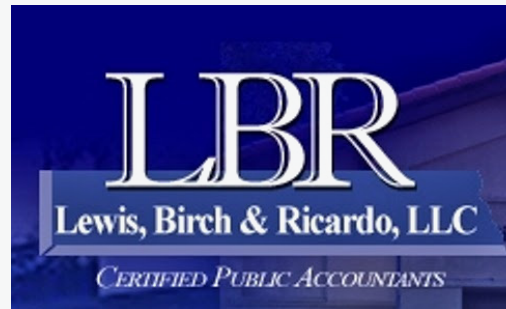


LEWIS, BIRCH & RICARDO, LLC



Paper-based challenges resolved for leading litigation support services provider

Lewis, Birch & Ricardo, LLC enjoy a multitude of benefits, following the implementation of a new record management system



The Isynergy team was engaged by LBR, a premier provider of litigation support services, to provide and implement an Electronic Content Management system that immediately addressed and resolved their paper based challenges. Over the following months, LBR, gained an in-depth understanding of the business challenges associated with litigation support, and cooperatively developed both an efficient scanning workflow and an optimised indexing structure for rapid retrieval.

Challenges

The sheer amount of paper and binders required in order to provide evidential support for business evaluations and analysis posed a wide range of unique problems for LBR, who were;

- Inconveniently weighed down by the heavy and bulky binders/documents associated with each legal matter.
- Often faced the less than ideal prospect of carrying entire luggage carriers, containing multiple boxes of documents, for a single meeting.
- Required by law to provide opposing attorneys with financial documents and analysis in a timely manner; meaning that speedy replication was extremely challenging, but a necessary action.

The amount of paper and binders previously required caused significant problems for LBR



Results

- The iDatix solution implemented by LBR started to pay off instantly. Immediate visibility to client files, exhibits and other legal material, to be shared between departmental employees, quickly validated their purchase.
- Employees now have concurrent access to all case documents, whenever they need it. Around 50% of documentation is now accessed online, eliminating the need for labour-intensive manual searching, time wasted waiting in turn to access specific information and the expensive printing out of documents. As a direct result, copying costs have been reduced by 58%.
- Partners now have remote access to information, without being tied to the office. Valuable time previously spent driving to the office and back on weekends and evenings in order to access files has been freed up - resulting in a massive increase of 33% in additional billable hours without the increase in time spent in the office. Remote access in the field means that partners can spend more time meeting with clients and enjoying their personal time i.e. fishing and playing tennis, rather than making repeated visits to the office to read paper documents.
- The need to create physical document binders, containing information requested by opposing attorneys, has been eradicated - freeing up employee time and effort and positively impacting on a 30% increase chargeable hours. 2/3rds of every case is no longer paper assembled and bound. This process previously required a couple of hours of work from each staff member, every week, with an average billing rate of \$125/hour (only part of this figure used to be billable). Paper copies are no longer required and vital information can be accessed in a more organised and efficient manner.

- The electronic storage of documents has generated an efficient and reliable disaster recovery procedure. Additional backup resources mean that partners can sleep at night without panicking about lost files, potential fines associated with lost paperwork are a thing of the past and a new client base can be reached out to due to vastly improved standards.
- An effective record management system has been created, allowing LBR to eliminate old case files and decrease overall long-term liability. Storage is much easier - and fees, that used to run extremely high, have been eliminated by around 2/3rds. There is no need to scan documents when a case is completed. An estimated £2000 is being saved each and every month on storage costs and 35% of post case administration has been eliminated,

LBR now have immediate, concurrent, remote access to vital client information



resulting in huge savings and allowing for the retraining and redirection of employee efforts into profit generating roles.

- A system of accountability for both clients and attorneys; who are required to provide documentation supporting their cases, has been created. With information so readily accessible, it is now much easier to respond to discovery requests, a process that used to take at least a couple of hours of digging around each week.

Michael Lewis, managing partner at LBR stated,

"Our firm has a large number of concurrent cases running at any one point in time. It is vital that we have access to all case documents on demand due to the nature of litigious matters.

The ISynergy team provided a great foundation for our document management system that has allowed us to leverage it in ways that were not anticipated prior to the purchase.

I can be confident that documents will be in the system due to the well-defined processes that we co-developed with the Isynergy implementation team. Other firms have actually asked us what system we use because of the way we are able to provide quick access to their document needs.

The manner in which we provide document lists to other firms has provided significant savings to our firm and is a strategic advantage when it comes to competing companies."