



PARTNER WITH YOUR INFORMATION AND WIN

BY STEVE MACKES

Every law firm, no matter its size, legal specialties or notoriety, has a powerful, persuasive partner at its core. Every law firm, including yours, has access to a partnering force capable of cutting overhead costs, improving productivity, helping to win cases and making certain that the firm, overall, is settling for more, not less. That partner is information, both yours and that of your clients. And while it doesn't require a big benefits package or a prime corner office with a spectacular view as so many other types of partners do, it still has to be treated right. That's what this white paper is about: how to treat your information right; how to partner with information so that it serves you and those whom you represent in the best, most effective way possible.

GET WITH THE PROGRAM

To effectively partner with information, you first need to show it some care. Information that is neglected, disorganized and unsecured is difficult to leverage. Even worse, uncontrolled information has the potential to turn and be used against you, like a hostile witness, if it gets in the hands of competitors, regulators, criminals, litigation adversaries or the media. Whether the information belongs to you or your clients, showing it care means having a comprehensive document management program in place that covers the entire records lifecycle from creation through to destruction.

A law firm, on average, deals with an enormous, continually growing amount of information each and every day. The sheer quantity of records, data and documents underscores the need for a coherent, user-friendly program that manages and controls it all. An essential part of such a program is the creation of a credible retention schedule. By identifying and then destroying documents that are no longer required, a firm reduces its information volume as well as associated storage costs and risk. And the benefits don't stop there. A complete, well-executed records program is able to favorably impact a wide range of issues at the very heart of a firm's operations such as security, compliance and productivity.

REALIZE GREATER PROTECTION

Information is absolutely critical to the functioning of a law firm. Vital documents demand confidentiality and are often irreplaceable. Moreover, leaks and other unintended releases of information are able to seriously compromise negotiations, strategies and reputations. Given these realities, one of the chief objectives of any document management program is to secure the firm's

information, especially records of a sensitive nature, at all times.

To secure information successfully, barriers must be erected that allow access only to authorized users. For physical paper records, this involves storing inventory in an environment, preferably offsite, which is monitored around the clock by trained, screened personnel utilizing advanced technology such as closed circuit video surveillance. The access to such a facility should be keycard protected and limited to authorized storage provider staff and/or key law firm personnel. In the case of electronic files, information should be stored in a single, web-based repository with a password-protected sign in, user/authorization restraints and multiple, separated back-up servers for disaster recovery.

A disaster recovery plan is needed to ease the pain of any destructive event and help facilitate information reconstruction. In developing such a plan, enlisting the help of a reputable, offsite, information management provider is highly recommended. An appropriate vendor candidate should inspire confidence and be able to demonstrate service capability, expertise and best practices.

Beyond preventing information from getting into the wrong hands or being prepared to restore data should catastrophe strike, records security also concerns the ongoing loss or misplacement of information. This, too is where the expertise and resources of a reputable document management provider can prove invaluable. For offsite paper storage, such an organization will offer cataloguing, indexing and barcode tracking services that dramatically reduce the possibility of information items becoming lost or misplaced. For electronic inventory, the provider will be able to encode digital files with complete chain-of-custody tracking. This ensures that every digital document has an easily accessible record of when it was created and edited and with whom it was shared, a capability of great value to legal processes such as discovery.

COMPLY MORE, RISK LESS

It's essential that an information management program addresses regulatory requirement through the creation and periodic updating of a credible retention schedule. A law firm's schedule should include retention criteria not just for general legal practices, but also applicable specialty law as well as any rules pertaining to specific industries served. Following these guidelines ensures that a firm is always in operational compliance with Federal, State and even International mandates. This helps build a reputation for being well-organized, above board and properly run. But most importantly, it saves money. By being in compliance, a firm is able to avoid the substantial fines, penalties and sanctions levied by governments and others for failing to meet retention standards.

An additional advantage that an information management program provides is the mitigation of risk. Through secure storage, controlled access, chain-of-custody tracking and the destruction of documents no longer needed, a firm significantly reduces its potential liability exposure to investigations, litigations, negative press and criminal activity such as fraud and identity theft.

INCREASE COST-EFFECTIVENESS

Getting a handle on the huge quantity of information created daily allows your firm to accomplish more while spending less. Key to realizing productivity and monetary gains is the scanning and imaging of existing paper documents to a digital environment, while, at the same, processing more and more new information electronically from the start.

Moving physical information to digital form provides savings in storage and maintenance costs. It also enables the firm to set up a shared digital platform where new information is quickly captured, extracted, distributed, processed and archived. A digital platform helps reduce printing and mailing costs. Even more significant, it supports the automation of work processes from research and discovery to payroll and invoicing. With this capability, there is the potential to dramatically reduce the overhead and increase the output of virtually every department, including Human Resources, Finance, Contracts, Accounting, IT and Administration.

ENCOURAGE CLIENTS TO DO THE SAME

While organizing, controlling and digitizing your firm's information is vital, there is also client information to consider. One could argue that there is a professional responsibility here. But it also comes down to a matter of self-interest. Given that the quality of your legal representation is closely linked to the state and management of client documents and records, this issue directly impacts firm performance. That's why each client should be strongly encouraged to initiate an active, document management program that includes the buy-in and approval of its major internal departments. Highlighting the many benefits of such an approach, i.e. reducing risk, elevating reputation, meeting compliance mandates, lowering costs and reaching new levels of operational efficiency, provide ample justification.

Additionally, for clients with whom you have a close working relationship, you may want to put in place an agreement that gives your firm ongoing permission to review client information. This can be a time saver that sidesteps typically slow, formal permission requests in favor of simplified, streamlined information access. An agreement of this type could also include an authorization for your firm to make information determinations and carry out the destruction of obsolete, post-retention records accordingly.

HOW GRM HELPS

As a recognized records management leader, GRM specializes in the storage, capture and handling of legal information, providing an integrated suite of services that address the entire paper and/or digital document lifecycle. Flexible, secure and cost-effective, these services include Offsite Document Storage, Scanning and Imaging, Data Protection, Workflow Automation, Certified Destruction, and Custom Compliance/Retention Programs. Services are implemented individually to realize a single objective or seamlessly integrated for more complex applications. This makes GRM one of the few companies capable of handling, in house, what it calls the Blended Solution—the storage

and maintenance of paper inventory while, at the same time, transitioning legal information to an electronic environment. Working with a single provider like GRM, as opposed to multiple vendors, helps your law firm maintain strict information control, eliminating communication gaps and issues with incompatible systems.

Some of the unique, legal services that make GRM stand apart include:

- Secure, Timely Pickups and Deliveries — in as little as 2 hours during emergencies.
- Scan-On-Request — quickly converts and delivers paper records to your electronic environment; utilizes OCR (Optical Character Recognition) and ICR (Intelligent Character Recognition) enhancement technologies when appropriate.
- PRECISIONplus Barcode Tracking — every item of information is catalogued, indexed and barcoded to facilitate searching and access; virtually eliminates the possibility of lost or misplaced documents and reduces the time and money costs of discovery.
- eAccess — remote inventory control interface for monitoring and managing paper and digital inventories from any computer with a web browser; provided FREE to every GRM customer.
- Disaster Recovery — includes prompt information delivery, continuous security with intrusion detection and data encryption, accurate damage assessments, offsite hosting and long-term recovery support.
- The Online Record Center — a single, Cloud-based, digital repository platform that requires no upfront capital expenditure or ongoing maintenance costs. It enables the immediate capture of information from any point of entry and supports an array of cost-cutting, integrated, workflow automation processes. The environment is secure, collaborative and compatible with most popular software/hardware systems, so little or no training is required. Low cost, quick deployment and digital automation flexibility ensure a rapid Return on Investment.

MORE ABOUT GRM

GRM Document Management is a leading provider of lifecycle records and information management solutions. The company brings proprietary innovation, blended integration and new levels of cost efficiency to document storage, data protection, digital/electronic document management and certified destruction. With over 25 years of experience, GRM has earned the trust and continued business of more than 5,000 customers—large and small, domestic and multinational—representing a wide range of industries. Clients are served from state-of-the-art, climate-controlled facilities in major U.S. markets and internationally throughout China.