

Legal Tech: Case Study

Jackson Walker Forges Ahead in an Ambitious Quest to Permanently Replace the Paper File

By **Sharon Kasachkoff**

It was just five years ago when our managing partner, Wade Cooper, shared his long-term vision for Jackson Walker's file management strategy. He challenged us to stop talking about going paperless and actually do something about it. Our firm's management realized that converting our workflow to an all-digital/electronic format would be a leading-edge innovation. Aside from the obvious advantages, our Managing Partner recognized the cost, mobility, efficiency, document access and risk mitigation advantages to going "paperless."

Our immediate reaction? No way! Jackson Walker has seven Texas locations with 370 + attorneys with its largest office in Dallas. At the time, we occupied 140,000 square feet, and well over 15,000 linear feet — five floors' worth — was paper document storage. An upcoming relocation of the Dallas office challenged us to make the vision a reality. Our footprint at the new office was going to be about 27% smaller, so we concluded that most of the paper records had to go. The only question left to address for each document and file was, do we scan and shred or just shred? The answer was complicated and required specific workflows based on the practice group and matter type.

Integration of Document Capture and Document Management

The technology that made our initiative possible was the integration of Omtool's AccuRoute, an enterprise-class document capture and workflow platform that enables organizations to capture, process, route and store document-centric content, with our iManage Document Management System (DMS).

The AccuRoute and iManage integration allowed us to create cover sheets with embedded profile information, which enabled us to scan

large volumes of documents directly into the DMS. Users could stand at a multi-function printer and scan the critical documents into AccuRoute. All profile fields were automatically populated, so the document just needed to be named. AccuRoute also compressed the documents upon scanning, which helped us avoid soaring data storage costs. And since scanned documents were OCR'd upon scanning, they were text-searchable from the DMS and thus were easier — and faster — to find.

Much planning was needed before the scanning could begin. On the AccuRoute front, we upgraded our software to the latest version and added servers to handle the additional volume.

With iManage, we had to make sure that the filing structure and naming conventions were both consistent, yet customized according to practice group. Jackson Walker has 14 practice groups, each with its own systems, naming conventions and filing strategies. Thanks to the flexibility of AccuRoute, each practice group was able to devise a solution that met its individual needs while still standardizing on a single approach and file-naming convention.

Letting Go

An important goal in setting up the AccuRoute-iManage system was to instill trust among the lawyers and staff so they could comfortably let go of the paper. Over time, we had to consistently demonstrate that the electronic file was just as good as or better than the physical hard-copy. We needed to find one or two champions in each practice group to help us lead the charge to reassure people. Our IT organization created the necessary infrastructure to instill confidence in the solution, including managing the network and setting up colocation and backup facilities.

Anticipating that construction of our new space would begin in March 2015, we officially kicked off the paper reduction program mid-2014. We scanned our entire intellectual property (IP) records room, addressing the challenge of capturing the unique tri-fold documents used by IP lawyers. Also, we digitized five fireproof safes full of client wills. We dedicated one person to scanning the will vaults for an entire year. Our closing binder room was scanned and electronic closing binders were the replacements. All the documents were scanned and hyperlinked.

For litigation, we had to devise an index of documents so lawyers and staff could see it presented visually. The electronic index included the date, document name, position, answer, etc. We developed an electronic file that looked exactly like the paper file. Hyperlinks took users directly to the files they wanted to see inside of the DMS.

We tagged the initiative as "Paper Light" to avoid the term "paperless" to appear less threatening. However, we were shocked that the lawyers actually embraced the concept and were very cooperative as we put this program into effect. The key element was support from our firm's management and the leaders of our practice groups. Without having executive-level buy-in, this project could have never succeeded.

The administrative departments of our firm participated in the Paper Light effort as well. We developed customized scanning processes for our marketing, accounting, human resources and other operational departments. Though paper may be useful while documents are being edited and finalized, everything is now eventually stored in digital format on the administrative side of the house.

Results

When we moved into the new 104,000 square-foot office in October 2015, we only moved approximately 3,700 linear feet of paper records storage, down from the original 15,000. At present, we are down to 2,500 linear feet of storage, a massive 80% reduction.

One of the greatest benefits we have seen is our lawyers' ability to access documents while outside of the office. They can view and retrieve documents via tablets, home PCs and smartphones, allowing them to service clients while no longer tied to the office. Also, multiple people can access the same files at the same time, further enhancing productivity.

Our paper file requirements have not grown; most people have permanently adapted to our electronic workflow. Because heavy litigation is an important part of the firm, we will always have paper, but the paper is eventually discarded. We have stopped sending closed files off-site unless there's a compelling legal reason for physical retention.

The extraordinary results we attained with our Paper Light initiative required creativity to get people excited about participating. We had

kickoff parties in each city with themes such as Sheriff Shred, Wizard of Oz and Hollywood Walk of Fame. Practice groups and individuals competed to scan or shred more than other practice groups and individuals. There were monthly drawings for prizes and other incentives. We believe creating a fun atmosphere with incentives helped us gain momentum on the project that led to our success.

Since our Dallas office move, the firm's clients and other law firms have contacted us to learn about our massive records scanning project. We've become a trusted adviser for our clients on the subject. We consider this consulting a value-added service to our clients.

Next Steps

With the success of the Dallas conversion behind us, we have begun similar initiatives in our Austin and San Antonio offices with Houston following in the second quarter of 2016.

Within the next 18 months, our goal is a 75% reduction of paper across the entire firm. The elimination of rental fees, material costs, offsite storage costs, etc., have contributed to significant savings on behalf of the firm. Our goal is to eliminate recurring storage cost of paper files. We are tackling long-term storage to save decades of retention costs. In fact, we expect our offsite storage will be reduced by 90% within the next two years. When boxes of documents are retrieved from the off-site storage facility, we convert them to electronic format and/or purge them — they are not returned to offsite storage for continued preservation. We plan to become fully Paper Light by late 2018.

Our managing partner's vision became a reality. We are now moving forward and working in a better, more sustainable and dramatically more efficient way.

***Sharon Kasachkoff** is Chief Logistics Officer at Jackson Walker, the firm's senior leader overseeing records, facilities, operations, construction and expansion. Team leaders who played a significant role in the success of this project included **Staci Freeman**, manager of risk and records. Staci is the main point of contact working with records management staff and is responsible for the methodology involved in converting from a paper to digital format. **Anna Koepke**, facilities manager, also played a major role in the project's initial deployment and its ongoing success.*