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## Pulp Friction

### HOW A LOCAL FIRM SHED TWO DECADES OF PAPER FILES

by Don Lipper

**G**oing paperless has improved the Generations estate-planning firm's efficiency, disaster-proofed the Sacramento-based company, slashed costs and delivered an annual \$169,000 bonus to the firm's bottom line.

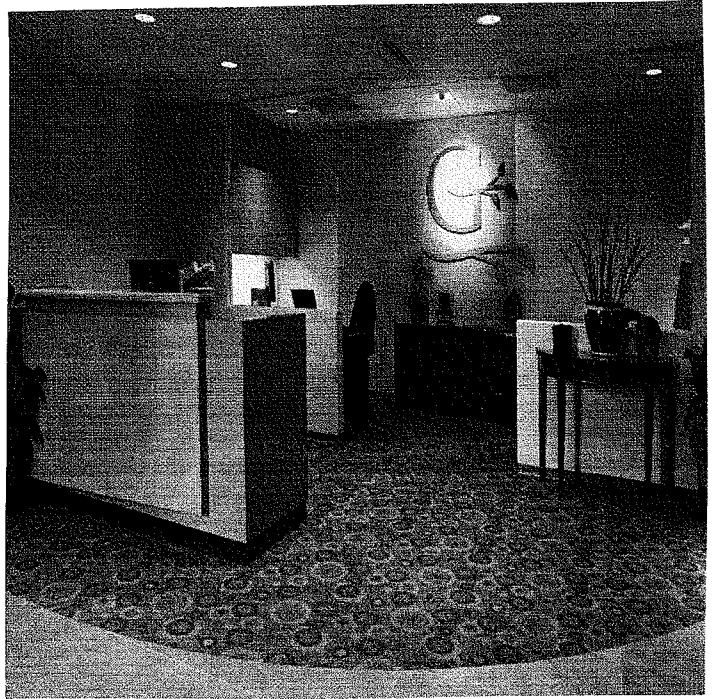
For many companies, the paperless office is elusive. The average office worker is drowning in paper. According to one paper-industry study, every year, the average U.S. office employee generates approximately 27 pounds of paper. And according to Statistics Canada, paper consumption has doubled the past 20 years. So the paperless ideal doesn't start with technology. It starts with rethinking your business.

Generations never generates paper. A client's initial consultation is conducted face to face, with the lawyer scribbling notes on a tablet PC. Every document is created digitally and rarely gets printed out.

If you've got a box of legal documents, the firm's scanner (working at the blazing speed of 45 pages a minute) will make an Adobe Acrobat file of the documents and leave you with the originals. If you need to sign a document, Generations will print it out, get your signature, scan it and you leave with the original document for your records.

When clients return to their desks, they receive an e-mail with attachments and a link to content on the Generations website so they can view or print a PDF of any of the documents in their file.

Because documents are stored on the network, Generations has immediate access to all client documents. Generations employees can even help clients from the road using the firm's virtual private network. And everyone in the office can see the status of any matter at any time.



"Old habits are hard to break, but being paperless has allowed us to provide a higher quality legal work in less time than when we were paper-based," says Trudy Nearn, the founding attorney of Generations. "We have significantly increased our customer service as a result of going paperless."

"I think we got our money back in a year."

— Tom Nearn,  
COO, Generations,  
on implementing a paperless office

The push to paperless started when Trudy started her new firm. She had 22 years worth of legal files on 200 clients. Nearn kept a close watch on how much time was wasted waiting for files to come from an off-site storage facility. She asked her husband, Tom, an engineer by training, how the firm could put all those files on computer.

PHOTO ILLUSTRATION: HUGH KRETSCHMER

Tom re-examined how the firm did its business. "I think vision is the most important ingredient in the process of going paperless," says Tom Nearn, chief operating officer. "You have to have a vision of where you want your firm to be in the future. This provides the durability that allows you to stay the course as you hit the bumps and turns inherent in implementing this program.

"If you consider that a reasonably up-to-date office has a server, backup solution, digital copier/scanner and XP workstations with Office and Acrobat as their base systems, then the cost to rev-up to our paperless system is very modest. The only big cost is converting the past files," says Tom. "I think we got our money back in a year to a year and a half. Then we began to enjoy the benefits."

The office looks like every other office, except there are few filing cabinets and every workstation has two screens. "The importance of dual monitors is huge," says Tom. "The people working in a paperless office must feel

<b>Annual Savings</b>	
Reduced footprint from 3,600 to 2,500 rentable square feet	<b>\$24,000</b>
Reduced office furniture (no need for file cabinets)	<b>\$5,000</b>
Reduced paralegal workforce from 4.5 people to 3 people	<b>\$50,000</b>
Reduced administrative workforce from 2.5 people to 1.5 people	<b>\$40,000</b>
Increased output by capturing more billable hours and becoming more efficient	<b>\$40,000</b>
Eliminated off-site storage of 10 years worth of files	<b>\$10,000</b>
<b>Total</b>	<b>\$169,000</b>



# GENERATIONS

*an estate and trust law firm*

*Tax Smart*

*Family Savvy*

*Intensely Human*

good about the system and they are not happy if they must constantly switch back and forth from application to application on one screen.

"In fact, when they had just one monitor, they used to print out the scanned documents so they could look at them while working on a file; mighty annoying to them and to me," contin-

ues Tom." I do not think we would have gone to dual monitors if we had not gone paperless."

"Now everyone is so spoiled by the technology," says Trudy. "When I work from home, I only have one screen and have to go between two programs. I tell Tom 'I'm going to the office because I want to have two screens.'" ©