

Business & Careers

Chasing the paperless office

Electronic document systems save time and money, but require careful planning

GRANT CAMERON

When Andrew Feldstein took stock of his law office several years ago, he didn't like what he saw.

"I was accumulating boxes and boxes of paper that I was going to have to eventually store and, perhaps at some point in the future, have to shred," says the owner of Feldstein Family Law Group. "That's a very significant legacy cost to my business."

Feldstein decided his Toronto firm would go paperless, or at the very least use less paper.

"Most family law firms are not paperless. But I saw how much paper we were going through and felt it was absolutely outrageous. Being part of a global community I didn't think it was appropriate for us to be doing that kind of damage to the environment.

"From a business standpoint, we were also spending a ridiculous amount of time on paper."

Feldstein formed a committee of a lawyer, support staffer and office administrator to develop a plan to save documents electronically, and a consultant was brought in to set up the software for the new system.

"Everything was planned out in great detail in advance," says Feldstein.

On Jan. 3, 2011, the firm officially went paperless, with all documents saved electronically and searchable by keyword

via document-management system Worldox. The system enables lawyers to instantly view any document, form, pleading or e-mail associated with a specific client, even if the person who created it has left the firm.

Feldstein says the firm still keeps some paper — signed separation agreements, final court orders, retainer documents and the like — but going otherwise paperless has saved the firm time and money, and has made life easier for lawyers and staff.

"It means that when a client calls me out of the blue and asks me a question I have the file at my fingertips. I don't have to say to the client, 'Let me go find the hard copy of the file,' and that means I don't have to have the fear that the filing is behind by a week and I have to track down that letter that just came in."

Business and technology lawyer Allan Oziel, principal lawyer at Oziel Law in Toronto, says newer and smaller law firms in particular are embracing the idea of a paperless office because of the savings in time and money and the ease of implementation at the start-up stage.

Many larger firms maintain paper files but are increasingly warming to at least "less paper" by using document management systems, Oziel says.

Being paperless makes it easier for lawyers whether

Costs, Page 21



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Costs: Systems fail, so ensure strong backups in place

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in the office or not to access files, and saves on storage costs. Electronic files are also often more “complete” because documents are scanned when they come into the law firm and, if stored on a server or the cloud, can be accessed by more than one user at a time.

“You don’t have to be concerned that paper is in one place and the physical file is in another,” says Oziel. “[And] you don’t necessarily have to remember the name of the document; you just have to remember certain words in the document that are relevant to what you need to look for.”

Oziel went paperless when he started the firm three years ago. It wasn’t difficult, as he had only himself and a law clerk. Established firms with existing paper-based filing systems may have more difficulty making the transition to paperless because they’ll have to convert files, he says. As well, older lawyers might only be comfortable reading paper documents.

“The way you would have to do it is by creating an implementation plan wherein

perhaps you keep the current files on paper and, as you open newer files, they’re paperless.”

Richard Morochove, president of Toronto-based IT consulting firm Morochove & Associates, says that as technological advances make paperless systems more efficient and easier to use, more law firms are moving to them. However, he notes that some firms fall into the trap of buying software and hardware before developing a plan.

“You go through your workflow first and see what should be changed to take advantage of the new technology,” Morochove says. “Unfortunately, what a lot of firms say is, ‘Well, we’ll get the technology and just keep doing what we did before but we’ll just put the technology in,’ and that’s just not the right way to go about it to get the most efficiencies.”

Before choosing document management software, Morochove recommends an analysis of how many clients are expected on an annual basis and the number of documents that might be created for each of them. Firms then have to

consider where they intend to back up the data, because in the end that will determine what type of hardware they need.

“You’ve got to analyze what you’re doing and say, ‘What is the most efficient way of doing things with the new technology?’ After you analyze and change your workflow, then you require the technology to implement it.”

While Morochove touts the benefits of a paperless office, he warns they are not without drawbacks. Hard drives don’t last

forever, so good backup systems have to be in place. One solution, he suggests, is a data storage technology called redundant array of independent disks, or RAID, which enables files to be stored on multiple disk-drive components.

“If you have everything in a filing cabinet, you can say, ‘Well, if the electricity happens to go off it’s still there. With electronic files, though, hard drives will eventually fail and you have to make sure you have the procedures in place to ensure that the data is backed up.’”



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