

Welcome to the Fall 2006 edition of Mattern Matters. My name is Rob Mattern and I am the President of Mattern & Associates, LLC.

While reading the Sunday newspaper I came across an article detailing an individual who had employed a *“personal healthcare advocate”*. For those of you who don’t know, (and I didn’t) what a personal healthcare advocate does, it is someone that for a fee “navigates the labyrinthine healthcare system, identifying specialists, translating “doctorese” and negotiating medical claims”. Most are independent of any healthcare provider. As Betty Long, a personal healthcare advocate highlighted in the article, stated “You wouldn’t think of going into the legal system without a lawyer, ... you wouldn’t want to go into the medical system with an advocate.” As stated by one Director of Benefits and Risk Management for a local corporation, “the cost for this service is “peanuts”. And how do the Doctors feel about the role of these advocates? Surprisingly most Doctors welcome them into the process. As one Surgeon put it in the article, “an empowered patient does better.”

In rereading the article a number of times, I was struck by how similar the role of the healthcare advocate is to the role Mattern plays in regards to the support services. Not to equate a life threatening disease or medical condition to negotiating a new outsourcing contract, but Mattern & Associates empowers our clients to make intelligent well-informed decisions about their support services. We understand the support services world, we know each vendors strength and weaknesses and what questions to ask, and how to negotiate a contract that works for both the client and the vendor.

If your support services operation (copy, mail, records, cost recovery) needs a “check-up” or it is not operating the way it should, give us call and we can discuss how we can help.

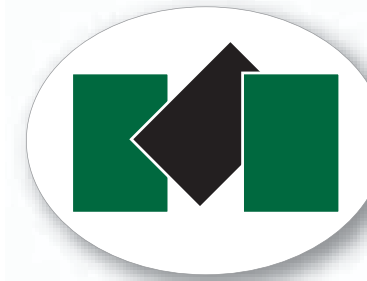
Thanks, and have a great Fall.

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Support Services Advisors



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Consolidating Vendors

Organizations with multiple offices often have multiple vendors. Many organizations are looking to consolidate vendors to create standardized pricing and service levels at the enterprise level. Some of the areas where law firms have had success in consolidating to a single vendor include:


- ◆ Outsourcing
- ◆ Duplicating Equipment
- ◆ Paper
- ◆ Office Supplies
- ◆ Offsite Records Storage

Often, individual offices have created and developed relationships with their vendors. Consolidating efforts may encounter resistance. To address this, Mattern recommends creating a “business case” for consolidation using the following steps:

1. Due diligence - if you are embarking on a consolidation effort, it is important that you gather all pertinent information from all of the offices to be involved. Often, one or two of the offices in a firm are “large” and have the “greater spend.” This does not mean that the items purchased in this office are required in the other offices. Mattern suggests meeting with the appropriate personnel in each office to determine what products/services are utilized and why. Identify the vendors

they are using. Basically, you need to create a snapshot, both financially and operationally to understand the needs and culture of each office.

2. Analysis & recommendation - Analyze your findings and develop recommendations. Determine potential “standard” items or service levels. Identify possible vendors. Prepare scenarios that will show both the financial and operation impact of your recommendations. Be prepared to discuss the cultural impact.
3. Buy-in - This is usually the most important step. Present your findings to the appropriate personnel in each office. Make sure they understand what you are trying to accomplish and allow them to provide feedback. Ultimately, the decision on whether to proceed with a vendor consolidation may not be made by these individuals, but you want to create allies. In addition, you may want to consider having representatives from each impacted office to participate in the consolidation (Request for Proposal) process and vendor selection

Even by following these steps, consolidation efforts may still be resisted by individual offices. Do not give up! If done right, the time and effort spent in this endeavor will be more than worth it in improved service levels and pricing. 

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Postage Equipment... Time to Upgrade?

At the end of this year, approximately thirty-eight (38) models of postage meters will no longer be in compliance with United States Postal Code. (For a complete list, visit: http://www.usps.com/postagesolutions/_pdf/meters_by_phase_version11.pdf)

If your postage meter is affected, you will have to procure a new unit before January 1, 2007. This provides an excellent opportunity to review your current mail needs and procure the proper equipment at the right price. To do this, Mattern recommends the following steps:

1. Determine your needs:

- a. If you are not already doing so, track your outgoing volume. In addition, track the type of mail that is being sent. Typically, the majority of law firm outgoing mail consists of the following types:
 - i. Letters - usually in #9 or #10 envelopes, containing correspondence, notices, invoices and payments
 - ii. Flats - usually in envelopes approximately 11"x13", containing correspondence, larger legal documents and marketing materials
 - iii. Most firms send one or two mass mailings (500 pieces or more) several times a year. These are

usually marketing mailings, however may be client related

- b. Identify required features. Be sure that the available features on your current machine are being utilized, such as "weigh-on-the-way" or accounting. If not, identify them as unnecessary
- c. Identify new features. Is there anything your current machine is not doing that would increase efficiencies? Prepare a list of "desired" features.

2. Research products - contact mail equipment vendors to determine what type of products they have available. Mattern recommends exploring other manufacturers in addition to your current provider, even if you are satisfied with them.

3. Conduct a Request for Proposal - solicit bids from vendors who provide the equipment. In your bid, be sure to specify your minimum requirements. If you have an outsourcing agreement, you may want to include your outsourcing vendor.

4. Select & Implement - based on the responses, determine your final solution and pricing.

When done correctly, replacing your mail equipment can result in reduced costs, increased efficiency and compliance with the United States Postal Code. M

MATTERN MATTERS is a quarterly publication offering business and support services information. Should you have any questions about your support services, or if you have any comments on this newsletter, please do not hesitate to call us at (302) 475-7004. You can e-mail us at lschneider@matternassoc.com or contact us through our websites at: www.matternassoc.com or www.supportquestions.com
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Internal Mail - Make it Easier

In today's hectic world of busy law firms, one of the last things a legal assistant needs to worry about is the mail. Whether a mail sweep occurs every hour or every other hour, something can be in place that notifies the end user that the most recent mail sweep has been completed. Also, without forcing the end user to "search for a needle in a haystack" by rooting through his or her inbox for a particular item, specific tools can be utilized to notify the end user by simply glancing at the inbox that they have received an item of importance.

Here are some tips that Mattern recommends to make internal mail operations more efficient:

Facsimiles:

- ◆ Utilize a fax server or scanning device to have all incoming facsimiles sent electronically to the appropriate recipient.
- ◆ Outgoing facsimiles can be placed into colored envelopes, identifying them for immediate processing. When returned to the sender, the colored envelope in their in-box will identify the contents as a completed outgoing facsimile.
- ◆ As an alternative to colored envelopes, the facsimile paper tray can be loaded with a bright colored paper for the confirmation sheet to be printed on. When sent back to the sender, the confirmation sheet would be attached and the bright colored paper would identify the document as a completed outgoing facsimile.

Duplicating Work:

- ◆ Duplicating work returned to the end user can have a copy of the original work request form copied onto a colored sheet attached to it.

Hand Deliveries/Messenger Requests:

- ◆ Hand delivery confirmations/requests can be printed on a colored sheet

Mail Sweeps/Rounds:

- ◆ Utilize Sweep/Rounds logs - These are sign-off sheets located at either each pick-up location or strategic locations that are filled out with the operator's name and time as pick-up/delivery sweeps are completed. An alternative solution is to have laminated cards for each outbox which read:

"THE (Enter Time Here) MAIL
SWEEP HAS BEEN COMPLETED.
THE NEXT MAIL SWEEP WILL BE AT
(Enter Time Here)"

There can be a card for each sweep and each pick-up point. As clerks do their sweeps, they pick up the last card left and place the next one. These types of logs keep end users informed of the pick-up/delivery schedule and ensure that all pick-up/delivery points are checked on every sweep.

When the logs are accumulated for historical and data purposes, the information can be gathered to be summarized in monthly or quarterly reports. The reports can be used as a guide to measure the performance of internal support staff.

The above are just examples of some processes that can be utilized to make the mail operation more efficient. Using these as a guide, firms can develop "notification" tools for other accountable items. M



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Associates, LLC**
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Mattern & Associates, LLC would like to thank the following clients and congratulate these valued vendors:

Mayer, Brown, Rowe & Maw LLP
Open Outsourcing Request for Proposal
Pitney Bowes Legal Services

Baker & Daniels
Closed Outsourcing Request for Proposal
Pitney Bowes Legal Services

Baker & Daniels
Open Cost Recovery Request for Proposal
nQueue

Ballard Spahr Andrews & Ingersoll LLP
Washington DC Office
Closed Outsourcing Request for Proposal
Océ Business Services

Kelley Drye & Warren LLP
Closed Off-site Records Storage Request for Proposal
Archives One, Iron Mountain and Recall

Thompson Hine LLP
Open Outsourcing Request for Proposal
IKON Office Services

Thompson Hine LLP
Open Cost Recovery Request for Proposal
Veritrak Systems, Inc.

Thompson Hine LLP
Closed Off-site Records Storage Request for Proposal
Archives One, Cintas, Iron Mountain and Lincoln Storage & Moving Co.

Ballard Spahr Andrews & Ingersoll LLP
Open Cost Recovery Request for Proposal
Control Systems