E D I T O R I A L

Welcome to the Spring, 2005 edition of Mattern Matters. My name is Rob Mattern and I am the President of Mattern & Associates, LLC.

Recently I was giving a presentation to approximately 130 CFOs from law firms around the country on outsourcing and the Request For Proposal (RFP) process. As many of you know, we highly recommend the use of a scorecard to quantify and assist in the decision-making process. As part of the presentation I reviewed a scorecard from a recent engagement.A copy of which is displayed here.

Criteria	Decision Weight
Price	40%
Presentation	10%
Terms and Conditions	10%
Ability of Vendor to Introduce New Technology	10%
Geographic Coverage	10%
Quality of Personnel	20%

One of the first questions I was asked after I reviewed this slide was how much did I feel price was a factor in the vendor selection process. My answer was that price is a factor (40% of the weight is about right) but it was never the deciding factor. As a matter of fact I could not remember the last time the lowest priced vendor was awarded a contract in an engagement we were involved in. The comments from the audience that followed seem to agree with this answer and additional comments made throughout the rest of the conference confirmed these sentiments.

Now on the flip side, in briefing a vendor after a RFP process, even after reviewing the scorecard and results, most vendors are still fixated on the issue of price. Where did they rank, how did they compare to other vendors, etc. One of the reasons, I surmise, for this fixation is that price is quantifiable and the other factors are not. We stress that there is whole lot more to the decision-making process then price and try to focus the vendors on those criteria.

In closing, price is an important factor, but it is not the only factor in any support services decision. It is much more important to address the client's concerns whether they be technology, transition, terms or quality of personnel. M

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Procuring Duplicating Equipment in the 21st Century Law Firm
(PART TWO - CONCLUSION)

Network Integration

Integration of workflow products multifunction devices is one of the biggest challenges facing firm's embracing this technology. IS involvement is mandatory. Representatives from Canon, Ricoh and Xerox have all claimed that the main challenge in integration and installation is having someone from the firm's IS department involved and available.

When determining which solution is right for your firm, you will need to provide network and system information to your vendor. They will need to know such things as:

- Type and version of servers
- Operating system
- All applications and current versions
- Any scheduled upgrades or migrations
- A summary of the firm's network/ system plans for the next 36-60 months

The process of procuring duplicating equipment is no longer as simple as looking at volumes and speeds.

Cost Recovery

A key, and often overlooked, component of selecting and implementing a networked MFD solution with workflow tools is the use and integration of a cost recovery system. There are two (2) items that need to be addressed:

1. What and how do we charge?

Firms have historically charged clients a "per click" amount for copies made. Most firms do not charge for prints made on a network or personal printer, or for scans (Some firms do charge a labor rate for time spent scanning). With an MFD, a print migration and scanning strategy, a firm must decide what, if anything, they will charge to their clients.

(continued inside)

Procuring Duplicating Equipment

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The most important question, ultimately, is: "At the end of the day, what do we want to have accomplished?"

Some firms will charge different amounts for each. For prints, some firms will only charge prints made on MFD's and not network or personal printers. Other firms develop rules that the first set printed on an MFD is not charged, but all subsequent sets are.

Another way to approach this issue is to develop a single "impression" charge. This would be a flat rate anytime an "impression," i.e. a copy, print or scan, is made on any of the MFD's or network printers.

This decision should be made before implementation and rollout of the MFD and its features. It is less difficult to reduce or remove a cost recovery process, then it is to suddenly begin charging for services/products that were initially "free."

2. Can our current system capture prints & scans?

If your current cost recovery system is five (5) or more years old, chances are you will need an upgrade to capture prints & scans. If you have analog terminals connected to your duplicating fleet, you will need to replace them with newer, IP-based terminals.

Note:

Accuroute will validate at the desktop thereby allowing you to use older, analog terminals to capture scans.

If you have recently upgraded your cost recovery system, you may have IP-based terminals. In this case, you may only need to update your software.

Conclusion

The process of procuring duplicating equipment is no longer as simple as looking at volumes and speeds. Many factors must be taken into consideration. Decisions must be made on workflow and cost recovery issues. The most important question,ultimately, is: "At the end of the day, what do we want to have accomplished?" If you do not select a destination, you will always end up where you are heading: nowhere. M

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Records Management Help for Law Firms

The Records Policy and Retention Schedule

First of a series of articles to help you manage your records

The foundation of any good records management program is a records policy. The policy and retention schedule is important for the following reasons:

1. Reduce storage costs
2. Address office space problems
3. Retrieval costs
4. Records Location
5. Determine if records exist
6. Malpractice Insurance
7. Client Demands

While this list is not all-inclusive, it does give some sound business reasons for law firms to establish a records policy.

A records policy normally is comprised of four major parts:

1. **Records Policy Statement** - This statement usually states that records are an asset of the firm, all records types are included, regardless of the storage media and it is mandatory that the policy be adhered to at all times. Additional areas covered by the policy include, but are not limited to:
   a. Administrative records
   b. Client files
   c. Electronic records are included
2. **Provisions** - The following items spell out what are included under the policy and denotes specific areas such as:
   a. Definitions
   b. Client Disclosure and Notification
   c. Review
   d. Disposition
   e. Former attorneys and records transfers
3. **Schedules** - This part denotes how long records should be retained both on site and off-site. Specific lists include:
   a. Listing of records by type and practice group, with retention requirements
   b. Listing of administrative records with retention requirements
   c. Provisions to override retention periods for specific and documented reasons
4. **Procedures** - This section establishes the steps necessary to adhere to the Provisions and the Schedule. Specifically, they include the following:
   a. How to conduct the notification process
   b. How to conduct the review process
   c. How to manage the disposition process

The development and implementation of a records policy and retention schedule requires dedication, patience and compromise. The resulting policy will save the firm money and time in the future.

Next part - How much money can you save by implementing a records policy! M

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Below are recent tips from our website.

Tips for Records Management

1. When budgeting for offsite storage, determine your average monthly increase, and then increase your budget appropriately on a quarterly basis.
2. If you have your own internal records management software, then do NOT use an offsite vendor's program. Unless you need more from them, offsite storage vendors should really only be providing you with space and transportation.
3. Schedule integrity checks. At least once a quarter, go through all of the files in your on-site records center and make sure they are where they belong. Find those misplaced files before you have to!

Tips for Office Supplies Management

1. Standardize, standardize, standardize! It sounds a lot easier than it is, but start small and work your way up. Eliminate colored file folders, select one size redweld, and select two or three types of pens. It will ultimately cut costs and make inventory management more manageable.
2. Use storage bins for satellite areas. Storage bins, the right kind, can quickly clean up a satellite area. They also allow you to remove pens, paper clips, etc. from their boxes and pile them in the bins.
3. Assure people you can get more. One of the biggest reasons for hoarding is that people think the supply areas will run out of an item. Keep items adequately stocked.

In General . . . .

1. Ask for the information you need. Don't be a pain about it, but if there is information you need to do your job better, ask for it. The worst that can happen is you are told "no." They key word here is "ask." Never "demand."
2. Get involved in professional organizations. ARMA, ALA, and MSMA are some professional organizations to start with. But don't just pay your dues. Go to the meetings, network with your peers. Most likely, there is someone at those meetings who is facing, or has faced a similar challenge to one you may be facing and can provide some direction. Or, maybe there is someone at those meetings who needs YOUR help!