

Improving Efficiency and Client Service with eCopy Desktop

Moving into the 21st century

Law is a document-intensive field. Regardless of the size of law firm, documents must be efficiently managed and made available quickly and securely to a variety of audiences including clients, courts, and other law firms. The better the firm can manage documents, the better the level of service it delivers to their clients ... and the more successful it becomes.

That's exactly what Gerald Robinson of Robinson & Geraldo was trying to do. The firm he had founded in 1979 was doing very well, but he wanted it to do even better. The first step he took was to replace the old copier and fax machine he was using in the firm's Harrisburg, Pennsylvania main office. He decided to take this opportunity to address other areas of his document workflow.

Identifying problem areas

The more successful Robinson & Geraldo had become, the more it encountered problems and costs associated with traditional document file and retrieval methods. For example, clients would constantly be calling during the day to discuss pending cases. This meant that files had to be found quickly and brought to the appropriate attorney. Given the large number of clients, as well as the number of calls received each day, the process was breaking down. Client files could no longer be made readily available when needed. Adding to the inefficiency and frustration, files that had been pulled or were being updated manually were not available and could often not be tracked down.

What the firm needed was a simple way to handle the entire file process – from incorporating newly-received information from a variety of sources into current files to making files available instantaneously for consultations or for attorney reviews. That's when Gerald Robinson turned to his local Canon dealer.

A Case for eCopy Desktop

Rather than trying to sell the firm a new copier, the general manager of the Canon dealership met with Robinson and performed a thorough evaluation of the firm's document management needs. Based on this extensive evaluation, the dealer proposed the eCopy Desktop software to provide a more efficient document distribution environment and ultimately result in considerable cost savings for the firm.

The solution was based on the Canon imageRUNNER 400 that could provide advanced capabilities in both copying and faxing, leading to increased productivity. A print option was added to the iR400 to offer Robinson & Geraldo a high-speed, low cost network print solution.

Now that the firm's copying, faxing, and printing needs had been addressed, it was time to deal with the major challenge of document distribution. A scan board was installed on the iR400, which became an "on-ramp" to bring paper documents into eCopy Desktop.

"What I needed to improve the firm's capabilities was a simple way to handle the entire process associated with building and managing client files – from incorporating newly-received information from a variety of sources into current files to quickly making files available for consultations or for attorney reviews," stated Attorney Robinson. "The Canon imageRUNNER combined with eCopy Desktop software met this need precisely."

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Bringing Paper into the Digital World

eCopy Desktop enables users to perform a complete range of editing and manipulation tasks on electronic documents. That’s because eCopy Desktop provides users with the ability to treat electronic files just like paper, right on their desktop computer. With eCopy Desktop, users can view and annotate, perform Optical Character Recognition (OCR) to generate editable text, and store or distribute eCopies from their desktops. eCopy Desktop also enables users to combine or separate pages from multiple eCopies, to create a new document of selected pages, or attach a signature stamp. It’s a tool designed to help any company maximize the advantages inherent in using an electronic document versus paper.

A Unanimous Verdict

By adding the networked imageRUNNER 400 to the office environment, Robinson and Geraldo were able to enjoy considerable cost-savings. The firm was now printing and receiving faxes at the cost of a copy.

The firm also created a procedure by which all in-coming mail is scanned into a folder in eCopy Desktop. Then, as time permits, the secretarial staff opens the folder, takes each scanned document and electronically places it in the appropriate client file. This process is fast and results in fewer errors than manual methods. Once this has been done, each attorney can go into a client file and review any mail that has been received. The scanned mail now becomes a permanent part of the client file and can be viewed by anyone with access to that file.

“The ability to scan non-electronic documents into a client file results in additional time savings and enhanced efficiency,” said Attorney Robinson. “It lets each attorney access all information on a client without having to search for and pull the paper file – something that used to eat up a lot of time and wasn’t always successful.”

In addition, should more than one attorney need to access the same file simultaneously, it is available real time. With the addition of eCopy Desktop to their business, Robinson & Geraldo has:

- > Been able to provide a more prompt and efficient service to their clients
- > Provided for easy file access and retrieval
- > Maintained better file integrity and more orderly files
- > Opened the door to future projects including archival, disaster recovery, OCR, etc.

A Profile of Robinson & Geraldo

Robinson & Geraldo was founded in 1979 by Gerald S. Robinson and Manuel R. Geraldo, both of whom served as attorneys in the Office of the General Counsel of the U.S. Department of Housing and Urban Development in Washington, D.C. The firm has offices in Harrisburg, Pennsylvania and Washington, D.C.

The firm’s clients include individuals, small businesses, non-profit organizations and larger corporations throughout Pennsylvania, Maryland, Virginia, and the District of Columbia. Robinson & Geraldo’s carefully planned growth has enabled the firm to offer its services to an increased number of clients, while continuing to provide efficient legal representation and maintaining the personal level of customer service that has always been its hallmark.

