

Document Logistix helps Heald Solicitors outlaw paper filing



Company: Heald Solicitors

Country: United Kingdom

Industry: Commercial and Family Solicitors.

Profile: One of the longest established commercial and family solicitors firms in Milton Keynes.

Key Drivers: Risk reduction, improved client care, business flexibility and cost savings.

Based in Milton Keynes since 1980, Heald Solicitors employs over 30 people and specialises in Commercial Law and Family Law.

The firm's operations were dependent on large volumes of paper documents. Typically, paper documentation was retained for a minimum of seven years after the closure of a matter, so the volumes of paper in storage continued to increase. There were high costs and significant operational issues associated with the continued use of paper.

The firm was also aware of the significant security and customer service risks associated with continued reliance on its paper filing system.

Choosing Document Manager

Heald Solicitors had identified the need for a comprehensive electronic document management solution to reduce the risks posed by paper document storage, to reduce the costs associated with paper filing processes, to improve access to documents for all staff – both on and off site, and ultimately, to improve the level of service provided to clients and customer satisfaction delivered.

The firm progressed with a full demonstration and evaluation of two competing Document Management systems. Of particular importance as selection criteria were the ongoing protection of legal admissibility of documents stored within the system throughout the minimum seven-year retention period, and the ability for a user to search for any text within any document stored within the system.

Document Manager achieved the best performance against the firm's selection criteria. Document Manager's architecture and well designed API were significant contributors towards its selection by Heald.

CASE STUDY: Document Manager™ – Heald Solicitors



“We have the potential now to expand our business without more office space as our people can work collaboratively from home using Document Manager”

Kevin Windo
Chief Operating Officer

Benefits of Document Manager

- Reduction of paper usage and storage costs
- Improved staff access to documents
- Reduced costs of document printing and storage
- Improved staff efficiency and customer service
- Ease of deployment and adoption
- Strong customer support
- More efficient home working

Document Manager improves workforce efficiency

With its automatic update tool, Document Manager 2.6 proved easy to deploy across Heald's operations. “The help and support has been excellent” said Kevin Windo, Chief Operating Officer at Heald Solicitors.

The Document Manager solution delivered immediate reduction in printing and document storage costs, dramatic improvement in staff access to documents, both on and offsite, and enhanced customer service. Document Manager has enabled improved collaborative teamwork due to consistent document naming, filing and searching; resulting in unexpected efficiency gains.

Heald are confident Document Manager will deliver positive Return on Investment within twelve months because the firm's staff perform huge amounts of filing annually and Document Manager has reduced average filing times to just 30 seconds, including secure filing of emails.

Heald found Document Manager easy to adopt. “After training, the system is helpful and much like filing into a directory tree” said Kevin Windo at Heald Solicitors.

Document Manager is fully integrated into the firm's systems and document search times now average less than 15 seconds. Any document can now be found almost instantly.

By enabling concurrent file access, from any location, Document Manager improved the performance and flexibility of Heald's staff. Any authorised user in any department can find the information they need instantly.

Offsite document access has enabled staff to work more efficiently from home. “We have the potential now to expand our business without more office space, as our people can work collaboratively from home using Document Manager”; said Kevin Windo, Chief Operating Officer at Heald Solicitors.

Document Logistix Ltd

8 Copperhouse Court
Caldecotte Business Park
Milton Keynes, MK7 8NL

Tel: +44 (0)1908 366 388

Fax: +44 (0)1908 760 672