

THE ULTIMATE PAPERLESS LAW FIRM

*READY TO GO PAPERLESS?
USE OUR CHECKLIST TO
PROPEL YOUR LAW FIRM
INTO THE DIGITAL WORLD.*

CYBERLINKASP



READY TO GO PAPERLESS?

Purely paper based law firms are a thing of the past; we know it, you know it, and most importantly, your clients know it. Clients want fast access to documents and responses, and frankly, firms who are digging through files are going to have a hard time providing timely services. Not only that, but having a purely paper based firm is unsafe, important documents can be destroyed in disasters, such as fires, physically stolen in a break-in, or misplaced or incorrectly filed leading to confusion.

A paperless law firm solves these problems for you; documents are searchable, they can be accessed and shared on the go, and are highly organized. Time lost by searching through massive files to find one document is rectified by a simple search bar that will find these documents in seconds. An additional benefit is access on the go. As a paperless law firm, attorneys can access files in the car, the courthouse, or even the client's homes or offices, which saves you from the dreaded 'I'll have to get back to you'. Once your file is scanned in, it is searchable, accessible, and most importantly, never lost.

Even though the benefits are obvious, it may seem like a daunting task to move all of your hard-copy files to a paperless format. The process can be broken down into manageable and organized steps. Use our checklist to ease into the paperless word.

10 STEPS

1. Select a document management system (DMS)
2. Purchase Quality Scanners with OCR if your DMS doesn't have it
3. Decide how you will organize your files
4. Develop a naming system
5. Develop an intake policy
6. Upload all documents to the cloud
7. Make sure your files are stored in a back-up
8. Train Your Team
9. Set a deadline for ending your paper files
10. Inform your clients you have gone paperless

Be Paper Free!

1

SELECT A DOCUMENT MANAGEMENT SYSTEM (DMS)

Selecting a DMS for your firm can make being a paperless firm a breeze or extremely frustrating. Make sure your DMS includes most, if not all, of these features:

Email Management

Client emails oftentimes contain information that needs to be pulled up quickly. A good DMS will capture emails and place them in your client's file where they are easily searchable.

Matter-Centric

A Matter-Centric system will keep all your files in centralized stores or group files by a common identifier, making your files organized and easy to find.

Searchable Filing

A DMS will index your files and make them easily searchable.

OCR

OCR Technology converts image-based PDFs to a text enabled document. If your DMS does not have this, you'll need to buy scanners that do.

Fax-integration

Some DMS services will offer paperless fax services that automatically file incoming faxes.

2

PURCHASE QUALITY SCANNERS WITH OCR IF YOUR DMS DOESN'T HAVE THEM

Good scanners and OCR technology are must-haves when going paperless. If your DMS doesn't have OCR, make sure your scanners do.

3

DECIDE HOW YOU WILL ORGANIZE YOUR FILES

For example by client, by case type, etc.

4

DEVELOP A NAMING SYSTEM

A precise, proper, and universal file naming system is vital for paperless firms. Make sure you have a well-developed procedure that everyone is familiar with.

5

DEVELOP AN INTAKE POLICY

Even though you're paperless, some other firms may not be. Make sure you have procedures in place so your team knows how to handle these files.

Incoming Physical

Determine at what point the document should be entered into the DMS e.g. upon receipt, upon signing, etc. and then decide what should be done with the original hard-copies.

Incoming Electronic

All electronic submissions should be filed into your DMS. Our suggestion is to file them immediately when they're received.

In-House Document Creation

Newly created documents should be saved immediately to the DMS.

6

UPLOAD ALL DOCUMENTS TO THE CLOUD

Now it's time to move all your files over. All files need to be moved to your new DMS.

Scan Hard-Copy Only Documents

Any hard-copy documents you have need to be scanned and stored in the correct matter file.

Transfer Electronic Documents

Move any current electronic documents over to your DMS; some DMS will handle this process for you.

7

MAKE SURE YOUR FILES ARE STORED IN A BACK-UP

Although paperless systems are more secure and reliable, the best practice is to store documents in two separate locations; such as dropbox as well as your DMS. Alternatively, use a DMS that will store it securely on two servers for you.

8

TRAIN YOUR TEAM

Your team needs to know the ins and outs of your new DMS as well as new firm procedures. Take the time to train your team so they don't make avoidable mistakes.

9

SET A DEADLINE FOR ENDING YOUR PAPER FILES

Set a firm deadline for ending your paper file system. Make sure everyone knows when this is.

10

INFORM YOUR CLIENTS YOU HAVE GONE PAPERLESS

Your clients will be excited to know about your newly updated office and your new capabilities. They'll also want to know your policy on original documents; be sure to keep them in the loop.

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Now that your firm has gone paperless, it's time to take the next step and move to a Cloud Desktop. CyberlinkASP's virtual desktops will allow your firm to easily collect client details, make secure data transfers, share documents, and access critical information anytime, anywhere. Whether you're working from the courthouse or from the car, as long as you have an Internet connection, you're connected to the information you need whenever you need it. Not only will your firm be able to access your files anywhere from your DMS, but you will have the capability of accessing your desktop from anywhere.

In addition to accessibility and reliability benefits, CyberlinkASP will monitor your security 24/7, perform routine backups, and provide disaster recovery should a catastrophic event occur. Most importantly, this is a very cost-effective solution that gives you priceless peace of mind.

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