



LJN's

LEGAL TECH

Newsletter®

Volume 25, Number 10 • January 2008

Rapid ROI, Easy Integration With Equitrac Print Tracking & Cost Recovery Solution

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In law offices of any size, investment in capital improvements is an undertaking that requires considerable deliberation; given the lightning speed at which technology is moving in our world today, that's doubly so when it comes to investment in IT purchases.

Issues of scalability as the firm grows, integration with existing and legacy IT infrastructure, the quality of the end-user experience for attorneys and staff, as well as the perceived and real pass-along benefits to the firm's clients must all be taken into account.

All these considerations take on additional significance for small- to mid-sized law firms, with the impact of the size and timing of investments on the ability to grow the practice and provide service can be immediate and readily apparent. At The Van Winkle Law Firm, with our 36 attorneys and total support staff of 75, our growth projections and supporting investment need to reflect our firm's longstanding commitment to sound and responsible handling of our clients' needs. When it comes to IT, that means solid, well-conceived expenditures in support of both our short-term operational requirements and our mid-term planning projections.

Our decision to upgrade to Equitrac Professional 5 was based on the knowledge that its ability to integrate with our existing infrastructure, plus its relatively rapid return on investment, would not hamstring our operational or budget requirements in the short-term. At the same time, EP5's scalabil-

ity for adding additional workstations and functionalities in the future fit nicely with our firm's plans for growth and infrastructure expansion.

BACKGROUND

Attorneys and support staff at The Van Winkle Law Firm are spread between our two offices in Asheville and Hendersonville, NC, serving a broad range of business, institutional and individual clients in our area of the state. Supporting the activities of our attorneys and staff is our IT infrastructure, which includes a variety of Dell Poweredge network servers running Windows 2003/2000/NT operating system, with hardware comprised of about 110 Dell Optiplex PCs, nearly 20 HP4000 and HP5000 series network printers, a handful of Canon ImageRunner black-and-white and color photocopiers, Canon scanners leased from a local provider, a mixture of Sharp fax machines still in service and a pair of Pitney-Bowes postage machines, one for each office.

On the software side, our time-and-billing system is Omega 6.0 and we use NetDocuments through LexisNexis for our document management. In addition to Microsoft Office Suite and eCopy Desktop, we also utilize a variety of digital practice and other software throughout the firm, including SoftPro, Time Matters, Summation iBlaze, FPS, EVal, Filemaker, Casemap suite, DeedPlotter, HotDocs and Abra.

WHY EQUITRAC?

WHY UPGRADE?

The upgrade to Equitrac Professional 5 for our cost recovery and print management solution marks at least the third iteration of Equitrac software we've been through at the firm over the years. We considered other ven-

dors, but decided on the Equitrac upgrade because one thing we've learned with Equitrac's platform is that they think ahead and operate across multiple platforms.

At Van Winkle, we use EP5 for cost recovery for copies and scans and also to track printing output. We synchronize EP5 with our Omega time and billing system to provide integration of new client and/or matter numbers. One feature we did not have until our upgrade to EP5 is the ability for our attorneys and staff to print to multi-function devices from the desktop, while allowing us to capture costs — though at present, we're tracking prints but not charging for them.

The implementation was handled in house along with Equitrac's James Sheffield and our copier leasing company provided personnel to set up the interfaces between EP5 and the copiers. Our total cost of implementation was approximately \$34,000, plus maintenance fees on our leased on-device Equitrac terminals of about \$400-500 per month. We upgraded to EP5 in January 2007 and as of September, we probably turned the corner on recouping our investment.

The principal benefits from the EP5 implementation were our ability to track usage and billable versus non-billable costs for copiers, faxes and postage because of better reporting capabilities.

This allowed us to set a 70% cost recovery target on client matters and we've increased cost-recovery by about 22%, allowing us to add color copiers in each of our offices. The upgrade also enabled in-house color copying for the first time, because we were able to clearly demonstrate to the Firm owners that we could recover more than enough to take care of the additional per-copy costs of color. In addition, EP5's advanced reporting capabili-

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ties have been very useful in managing the output and projecting the wear and tear on our fleet of devices, allowing us to more accurately project our future device replacement needs and investment schedule.

IMPLEMENTATION

In previous Equitrac upgrades, we had some glitches, particularly when we moved from DOS to Windows. That actually wasn't due to Equitrac, but rather because some of our existing applications were behind the curve, the version of Omega we were using then for time and billing, in particular. These last two Equitrac iterations have gone very well and when Equitrac left the building on the EP5 implementation, everything they'd said they would do had definitely been done.

One issue we did have with the EP5 implementation was the result of having used our copier leasing vendor to set up the interfaces between EP5 and the copiers and to allow us to use the existing eCopy keypads on our scanners to input data. That was a money-saving decision and we had some issues resulting from miscommunication between our local vendor and eCopy over matching the correct versions of eCopy software running on our scanners with the new EP5 solution.

As it turned out Equitrac was very good about staying on top of it and managed to work it out with our copy vendor and eCopy. The only other issue we experienced with implementation was with assigning IP addresses to a couple of Equitrac devices. That was easily resolved, again through Equitrac simply dialing into our server to make the program change and the issue disappeared.

ADDITIONAL BENEFITS

We've been particularly pleased with Equitrac Professional 5's advanced reporting capabilities, which let users generate an incredible array of reports that you can slice and dice, import into Excel and work with just about any way you want. One way we can now use this information is in determining our printing and scanning volume, so we can decide if we will charge for all or some of these images in the future. This lets us recover more costs (primarily for copies), which in turn has allowed us to upgrade our copier and scanner fleet.

Our fax machines, our copiers, our scanners and our postage machines really take a pounding. Each piece of equipment has a cer-

tain monthly volume that it can handle well and once you get close to the end of their useful life, you need a faster machine. With Equitrac's reporting capability and watching usage, we can gauge the useful life of each piece of equipment. We're approaching that on a couple of our scanners and knowing when to replace and swap them out with faster scanners because our volume is going to increase is really useful.

To the ability to generate color copies in-house has allowed us to pass along significant savings to clients. We do a lot of litigation around land-use and condemnation, for which you need color copies and color photographs. Instead of sending the color copying outside for, say, 40 cents per copy, it's only costing us 16 cents in-house and we pass those savings along directly to the client.

There are additional benefits for the client in that our use of Equitrac reports to give readouts to send to clients every month means we don't have to go around to every machine and take meter readings. That's a real time savings.

UPCOMING IT PURCHASES

EP5 should handle our cost recovery and document out and tracking needs for the next 12 to 18 months. For now, we purposely implemented the solution only in our Asheville office, leaving the Hendersonville office until later. One reason for that is we have a T1 line between Asheville and Hendersonville and we need a telephone system upgrade that represents about a \$100K investment for us.

Once we've digested the phone upgrade we'll likely upgrade to Windows Vista in 2008-09, which is something we've already investigated. An upgrade to Vista will require replacing our equipment — about 65 desktops at a time — and also an upgrade of our network servers to Windows Server 2007 and our Exchange server as well. That represents a sizeable chunk of money for a firm of our size and we'd like to watch other firms and see how their implementations go before making the leap.

ADVICE FOR OTHER FIRMS

For firms considering an Equitrac upgrade or new install, one thing we would share is that we would have involved our copier vendor in the process much earlier to make sure the embedded keypad feature of eCopy could have been implemented more quickly and more easily. Equitrac provided a good implementation plan, backed it with well-trained staff and knowledge base. We assumed that Equitrac and our copier vendor could work out technical details between themselves, but had we included them both in our pre-implementation meetings, the process may have gone more smoothly.

For law offices generally looking at IT investments in the future, we would advise that the first thing they need to do is determine what it is they want the technology to do for them. Second, they need to do extensive research on the options available and then, third, estimate the cost vs. value of the purchase before going forward. Fourth, once the decision is made to proceed and a vendor-selected, plan as far in advance as possible, hold meetings with your vendors on a regular basis and make sure everyone has a firm grasp on the details. To make sure that the process goes as smoothly as possible, be able to provide your vendors with as much information as you have available and follow up to make sure they understand their role in the process.



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