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Ropers Majeski Implements Zero: Solves Entrenched Email Management Challenges

The Challenge: Document Management and Billing

When Maks arrived at Ropers Majeski, he was presented with two critical challenges—an aging document management system, the second was high reliance on manual processes for almost everything—including billing. To solve the first, the firm's Technology Committee selected NetDocuments to replace an aging OpenText document management system (DMS). Once the transition was completed, however, it was clear that this was a significant step forward in many respects—but incomplete.

In particular, as the firm audited the transition to NetDocuments, Maks noticed that e-mails were being filed to the wrong document type and some were not even making it into the system.

For some attorneys, only 40% of the emails were making it into NetDocuments.

Maks comments "The sheer volume of email was making it impossible to file e-mails to achieve 95% compliance. We knew then we had to approach the issue in a different way."

E-mails that do not make it into a firm's DMS significantly increase the firm's and the client's exposure to risk. Also, the firm's lawyers were using a variety of manual methods to track billable work performed on their mobile devices. Maks adds, "In certain cases, attorneys would take a screenshot of the e-mail and send that to themselves; some would star e-mails they worked on using a mobile device and un-star when they created a relevant billing entry; finally some would add a note using mobile device Notes application.

The only "quick" option was to drag emails into specialized Net Docs folders, but many users would not file the email until it was no longer needed which reduced the likelihood of the email being filed. It was incredibly inefficient."

This was clearly a serious issue negatively affecting the firm's compliance and resource utilization.

Background

Headquartered in Redwood City, California, Ropers Majeski Kohn Bentley is a leading Silicon Valley law firm with 100+ lawyers across nine offices. The firm has a diverse practice, encompassing both litigation and several different forms of transactional law. The firm has a strong presence on the West Coast and has been gradually expanding into the key East Coast markets.

Maks Agamir has been with Ropers Majeski for 4+ years and serves as the firm's CIO. Maks and his team are responsible for the firm's entire technical infrastructure, including both software and hardware, across all offices. This includes technology that touches both the day-to-day practice of law, such as time tracking and billing, as well as security and document management. If it's technology, it's Maks's responsibility.

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Intelligent Email for Innovative Law Firms

Time spent filing emails cut in half or more

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emails filed has doubled and continues to grow

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Approach/Selection

In 2017, nothing was available on the market that had the full capabilities or the flexibility Ropers Majeski required. Maks comments: "We spent almost a year and half looking for a solution and tried Decisiv from Recommind, TimeFinder from Tikit, and a number of others. Unfortunately, each piloted solution ended-up having at least one show-stopper: some stored confidential information without appropriate security; some required extensive infrastructure modifications; others needed external access to firm's secure systems, etc."

Maks became familiar with Zero as a suite of technologies powered by artificial intelligence that ran only on the user's device only – mobile or desktop. Zero automates both filing e-mails into document management systems and tracks billable time on mobile devices. It's installed as a plugin to Microsoft Outlook and an app for the iPhone. In December of 2017, Zero for mobile was successfully deployed to the IT department.

Implementation

Zero for mobile was quickly piloted to a group of 14 attorneys who were actively queried about their experience. Maks mentions, "There are no server setups, no complicated integrations, and no changes to our security measures. We simply installed it via MDM, logged in and it worked. The entire process took about ten minutes. It was like flipping a switch."

Maks continues:

> *"Training was not an issue as Zero's mobile solution is almost identical to Apple Mail, so quite often our users didn't even notice that they were using something different."*

The mobile pilot was completed by the end of February and the firm's management made a decision to move forward with the full roll-out of the mobile solution and the start of the desktop pilot after that.

Results

Today, Zero is rolled out, firm-wide, including all of the firm's lawyers, paralegals, and secretaries. Time spent filing emails by the firm's attorneys and legal secretaries has been cut in half or more, while the percentage of firm emails filed in NetDocuments has doubled and continues to grow. Time that attorneys used to spend on filing is now devoted to billable work or improving work-life balance.

Maks comments: "Information governance has significantly improved. With Zero, emails are filed into NetDocuments and can be easily found using Zero's filing audit log making copies unnecessary.

Most importantly, Maks adds,

> *"We are driving down the ratio of our hours worked to hours billed. Prior to Zero, some of our estimates showed lawyers spending around 1.5-1.8 hours in the office for each billable hour. With Zero in place, we are driving that ratio a lot lower, which has materially impacted our matter and overall firm's profitability."*