



By: Patrick Slaughter
LaFevor & Slaughter

GETTING STARTED SETTING UP A PAPERLESS OFFICE

This month we continue with our series about setting up your practice to allow you the freedom to work from anywhere on the planet, including – in my case – Walt Disney World.

The first step in the process is to go paperless. The idea of “going paperless” was intimidating at first. There is so much hoopla over this process in the legal world right now. My take is that instead of going paperless you are really just learning to work with less paper. I did some research and reached out to a few folks. Ernie Svenson of “The Paperless Chase” was the single best resource I found for information on going paperless. You can find him at www.paperlesschase.com. He also offers a subscription course called Law Firm Autopilot that is also worth checking out at www.smallfirmbootcamp.com. Tell him I sent you. Ernie is a friend of mine.

At the heart and soul of the paperless office issue are three things: 1) You have to decide where your digital files are going to live; 2) You have to decide how you are going to get the digital documents into their digital home; and 3) You have to decide how you are going to organize your digital space so that you can find things when you need them.

The first thing to decide is what online repository you want to use to handle storing your files in the cloud. You are probably already familiar with these services. There are Dropbox, Box, iCloud, Sugar Sync, etc. We use Dropbox. All of these services are pretty inexpensive (particularly when you consider the cost of storing paper in either an office or storage unit).

I chose Dropbox because of its ease of use. Dropbox works across PC and Mac platforms and is already incorporated into the Mac operating system. (We are a Mac based office.) I also like that Dropbox uses redundant backups in various data centers across the United States. Dropbox is pretty inexpensive. We spend about \$100 a year for each user. Our plan provides for one terabyte (TB) of storage which is about 1024 Gigabytes (GB). Over the past four years we are up to a whopping 80 gigabytes. We have plenty of room to grow. You can also always buy more space when you need it. Dropbox just works for us.

Whichever provider you decide to use, just make sure you know how their product works and what can screw up. You need to develop a plan to deal with whatever emergency or unexpected situation might come up, i.e. a file or document getting deleted inadvertently.

Making sure you get all of your documents into the digital file is crucial to making everything work. You need to spend some time figuring out where all of your documents come from and then create a system to make sure all of the documents that come from each source wind up in your digital file. We figured out that our files come from the following sources: 1) we create documents ourselves; 2) we get documents in the mail; 3) we receive emails with documents attached; and 4) we receive faxed documents.

We assign one person to make sure that everything ends up where it is supposed to. This person does all the scanning so that there is no confusion over whether something is scanned or not. This person receives all of the incoming mail and faxes before anyone else. They make sure everything is scanned and filed appropriately. Whenever we receive a document in email, that email is forwarded to the “scanner person” for them to file as well.

In case you are wondering which scanner you should use, the industry favorite hands down is the Fujitsu Scansnap Pro. The scanner

will set you back around \$500, but it is well worth it.

Once you figure out where your files are going to live, you need to set up a structure for those files that makes it easy for you to find stuff. We set up a Client File Template that is a primary file for each client matter with several subfolders contained within. These subfolders are arranged by subject such as Court File; Pleadings, Motions, Orders, Discovery, etc. Then each time we open a new matter we can just copy the Client Template file with all of its subfolders contained within and rename it appropriately.

Each user can file the documents they create in the appropriate place in the digital file. It's important to establish a standardized naming convention to be used on every file and document. We use a date, client last name, description of the document to name our files. This way the files are automatically sorted by date by the computer and we know to which client the document belongs as well as what it is. It also makes it easy to use the computer's search function to pull up whatever it is you need without having to go digging around to find something.

There is probably a lot more to “going paperless” than what I've described above, but these were the first steps that we followed and the rest kind of worked themselves out through trial or asking a friend. I don't have enough space to go into how you can insert your signature digitally into a pdf; redact documents; bate stamp documents without developing a sprained wrist, etc. However, I will say that I haven't found anything yet that I couldn't accomplish with an electronic file as opposed to a paper file.

Dedicate a Friday afternoon to deciding which service to use to store your files. Then figure out a system to make sure you get everything in the file. Do not expect it to be perfect. Just get started. You can always adjust and edit along the way and don't be afraid to ask for help. Soon you will be blasting off into hyperspace heading to the world of Tomorrow.

