

docSTAR helps law firms cut paper mess

We generate a ton of paper. That's one way David Armata, controller for Ganek, Wright & Dobkin, quantifies the impact of his firm's success in the real estate law marketplace. And it's one of the reasons he was so eager to find a document imaging and storage solution for the company.

Ganek, Wright & Dobkin, PC is a residential and commercial real estate law practice - "closing attorneys," as they call themselves. The firm was founded by Jeff Ganek in 1978, and has grown since then, with the addition of partners Bill Wright in 1984 and Richard Dobkin in 1992. For the most part, fourteen attorneys and 50 or more support staff handle real estate closings - 95 percent of them residential - from five offices in Atlanta and the surrounding suburbs.

The firm's Web site, www.titlelaw.com, says the firm practices "Happy Law," and that it works to make closings as stress-free and pleasant as possible. But if there's anything that made the firm's employees unhappy, and led to stress and unpleasantness among the ranks, it was trying to track down documents after a closing took place and the paperwork was filed away.

It was these volumes of paper, and the inability to retrieve documents efficiently, that caused Armata to look into imaging a few years ago. I had been thinking about scanning for a while, just because of the whole paper issue he says. About two years ago, he started seriously looking at systems. During his search, he happened to get a call from the local docSTAR Partner. They sent him information, and later arranged an in-person demo of the system at a neighboring law firm.

I looked at docSTAR and one or two other imaging systems, Armata says. He reviewed the information, probed further, and tapped the docSTAR partners expertise some more. We went back and forth over the course of a month or two, debating what product I wanted, what type of scanner I wanted, what kind of setup, which modules I wanted to use and so forth. Armata ultimately liked what he saw in docSTAR the features and price were right so he signed on as a customer during the last half of 2004.

Papers and processes

On any given day, the law firm processes 30 or more closings. That may or may not seem like a lot. But when you consider that each closing generates between 200 and 300 pieces of paper more if a second mortgage is included you could easily be talking 2.5 million pieces of paper a year or more. We're fairly good sized, Armata says, somewhat modestly.

Each file contains all of the documents required for a real estate closing. Before going to docSTAR, each time a closing was completed, the file headed to a central office where it was processed, then boxed and transported to a warehouse. Whenever someone had a question or needed to see a document contained in one of the files, the drill would be the same. People would be directed from the local office to the law firm's post-closing unit, where someone would take the call, start the research and find the box number. Then a courier would head to the warehouse to hunt down the box and bring it back to the post-closing unit. There, someone would look for the file, which hopefully is actually in the box, locate the document and send it to whichever office requested it in the first place.

That's not the case anymore. Now, it's scanned immediately, so if someone calls the post-closing office and says, We need such and such a document from such and such a file, we can pull it up and email it to them in a matter of seconds, Armata says. Documents are scanned immediately after the file is complete. You need to get things back recordings, deeds, and so on, he says. As soon as the title policy is



ready to be issued, they issue it, then box up the file and send it for scanning.

The general process for initiating a document search hasn't changed dramatically. Inquiries still go first to the office that handled the closing. If it's current, that office still would have the physical file, Armata says. If not, the call is transferred to the post-closing department. That's where the workflow has changed dramatically. Now, the post-closing staff clicks the mouse a couple of times, pulls up the document in the docSTAR system, and can email, fax or print and mail it in no time at all.

Most of the time, it's emailed. If the caller has e-mail capabilities, we'll email it to them, Armata says. If they only have fax capabilities, we'll fax it. But most people have e-mail these days. And when they email it, they actually can email it right from docSTAR, without having to cut and paste or save and attach. And even though Ganek, Wright & Dobkin has been imaging for less than 18 months, the new workflow handles the lion's share of the requests.

We started scanning in August or September of 2004, so we have a pretty good volume of files scanned now, he says. That covers most of the phone calls we get. We don't usually get phone calls for two and three and four years back. Inquiries for those older files account for, perhaps, five to ten percent of calls the unit receives.

Making it happen

When the law firm decided to pursue document imaging and storage as a way to improve their operation, they had some choices to make. Beyond selecting a provider, they had to figure out where to implement, what equipment was needed, which workflows to change, who to train, and more. Armata took what could be described as a conservative approach one that probably is well suited for a law firm.

Rather than impose imaging-based workflow changes company-wide, the firm opted to implement scanning at a central location. This provided greater consistency and more efficient processing. It also allowed for a smaller financial investment in equipment, since scanners would not be needed for each of the five offices. Also, the local docSTAR partner, could focus training efforts and resources more effectively, since all scanning, storage and retrieval would be handled from a single site, with staff dedicated to the task.

Management looked carefully at workloads and workflows in making the decision. They felt that by driving all scanning from a single location would reduce the need to "sell" process changes across all offices, and eliminate the need to spend time convincing skeptics. In any business, people approach technology and workflow changes with different degrees of acceptance everything from "gung ho" to "go away." Armata's firm was no different.

But that didn't matter, because the company opted to change workflows only for a limited number of people whose jobs would most dramatically improve as a result. Most people handling paper day to day don't do anything differently, Armata notes. The decision seems to have been the right one. Attorneys and others are noticing a difference. More people understand the concept and benefits of going paperless. And they are noticing that it's easier to make clients happy when you can get them answers more quickly.

Moving forward

Since the initial implementation in the last part of 2004, Ganek, Wright & Dobkin has added another workstation and another scanner, and has implemented bar coding. The bar-coding feature greatly reduces the amount of time we have to spend scanning and filing documents, Armata says. Before bar-



coding, it took more time to make sure file numbers were right each time, that names were spelled properly, that everything was right. When we went to bar coding several months ago, that basically cut our time in half. We didn't have to review as much, and I don't believe there have been any bar-coding errors.

Armata says a next step in his firm's deployment of docSTAR is evaluating the potential for broader document access. Right now, only a few people in the post-closing department can actually get to the documents in docSTAR. At some point, I'd like to open it up and let anybody in the firm go in and pull up things on their own, he adds. Hopefully, that will cut down on the amount of work in the post-closing unit. It will also speed customer response. He also sees value, down the road, in scanning in each office. That way, the data would be there quicker, Armata says. But the people in the local offices have enough work to do as it is, and we are not in a position to add to it.

Right now, the law firm is capitalizing on the value docSTAR has brought. The couriers who used to make two, three, four or more trips a day to the warehouse are busy now doing other things. Folks in the post-closing department are moving paper more efficiently, and finding documents more rapidly and easily. And attorneys and support staff at the home office and in the branches are responding to inquiries much more quickly. Obviously, our customers are pleased, Armata says. They get an answer in minutes, not days.

Armata at times envisions the day when the office gets rid of paper altogether. Then he wakes up. But it's a dream worth pursuing. One that - if it does ever come to that - will make Ganek, Wright & Dobkin not only a "Happy Law" firm, but a "Happy Law Firm."

