

"FileTrail has cut the time that attorneys wait for files in half."

Renee Tyler
Team Lead
Finkel & Altman, LLC

Case Study

Finkel & Altman, LLC

Law firm gains control of case files with FileTrail.

Client Profile

Headquarters: Columbia, SC

Industry: Legal

Finkel & Altman, LLC is a full service law firm that handles all types of litigation including residential and commercial real estate, corporate, finance, bankruptcy, foreclosure, and taxation matters. With offices in Columbia, Charleston, and Georgetown, the firm effectively serves clients throughout South Carolina with 24 attorneys and a total staff of 140. The firm implemented FileTrail to track and manage its work product in 2005.

FileTrail Implementation: 2005

FileTrail Products Implemented

- **FileTrail Enterprise** - Complete file tracking and records management automation across multiple locations.
- **FTMobile™** - The software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTColorLabel** - On-demand printing of color-coded folder labels.

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<http://www.FileTrail.com>

Background

Finding files had become a labor-consuming task for the law firm of Finkel & Altman (Finkel). As the South Carolina firm grew, the labor consumed in finding and handling files increased geometrically.

Finkel implemented the FileTrail solution in 2005, giving all staff access to FileTrail at their desks to streamline locating, requesting and tracking of case files. Since implementing FileTrail, files are delivered to attorneys in half the time, hundreds of hours are saved each month by eliminating manual searches for files, and many other manual tasks have been automated.

Eliminating Searches For Files

Finding files was a particular problem in the firm's foreclosure and eviction practices. A number of actions in these types of cases might require that the file be retrieved immediately. When a file was needed, staff would first look in the file room. If the file was already out, the hunt from person-to-person would begin. This not only consumed the time of the staff doing the search, but created disruption for others.

"The cases in foreclosure and eviction may be touched by 20 different support staff," said Mindy Thompson, IT Manager. "Once files were out of the file room we had no way of tracking their location. As a result, we spent hundreds of staff hours each month searching for files."

Improving Response to Attorneys

Prior to automating with FileTrail, the attorneys at Finkel often had to wait for files they needed. The process began with an attorney filling out a request form. If the file was not immediately available in the file room, the search for the file delayed the response to the attorney.

FileTrail simplified the process of requesting files. Attorneys now search the inventory of files at their desks. When multiple files exist for a case, the attorney can specify which file is needed, providing a precise request.

"There was some concern about whether the attorneys would use FileTrail," said Renee Tyler, Team Lead. "But, FileTrail is so clear and intuitive that everyone uses it now."

Application Highlights

- The FileTrail application is accessible by all staff at their desks to search, locate and request files.
- Color-coded labels are printed quickly and easily from FileTrail to create new files.

Key Results

- **Labor Savings** - Access to search the database at every desk has virtually eliminated manual searches for files, saving the firm several hundred hours of labor each month.
- **Improved Services** - Access to requested files at every desk has eliminated a manual request process, cutting the time that attorneys wait for files in half.
- **Increased Accountability** - Location audit trails increase accountability for files and allow staff to back-track to find the occasional lost document.
- **Best Practices** - Automated processes apply efficient and standardized practices, resulting in better organization and less chaos.
- **Automated Labeling** - Color-coded labels for new files are quickly printed on a single, strip label, dramatically reducing the labor to create a new file.

Customer Insight

We chose FileTrail because it was easy all the way around. The interface is easy to use, so we weren't going to be continually training staff. Also, the implementation process was easy. FileTrail has really honed their methodology into an interactive process that gave us the exact results we wanted, but didn't require a huge commitment of time from our staff.

In evaluating legal records management vendors, flexibility and cost were our two main factors. FileTrail won on price, but they excelled in flexibility and ease of use.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

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Improving Response to Attorneys

The 40 to 50 file requests each day are processed efficiently by the file room staff. The pull list report helps them locate and retrieve files efficiently, while the Delivery List report helps them deliver files to the correct attorney. A single "fulfill requests" button automatically checks out the pulled files to the correct attorney.

"Using FileTrail, requests are processed in a very efficient way," according to Tyler. "Also, because of the tracking features the files are found quickly. The result is that FileTrail has cut the time that attorneys wait for files in half."

Creating Files More Efficiently

Creating the folders for the firm's 300 to 350 new cases each month used to be very time-consuming. Like many firms, Finkel applied eight or nine labels and color tabs to the end tab of each folder.

FileTrail streamlined creation of files by printing a single strip label that contains all the text, color codes and a bar code. Applying a single label instead of many saves a lot of time.

"Now, we apply just one label printed by FileTrail, so the whole process takes a tenth of the time that it used to," said Elizabeth Rhudy, Paralegal.

Powerful Customization

One of the foundation concepts behind FileTrail was to use the data and terminology unique to each client organization. Delivering this kind of flexibility requires configuration tools and a methodology that keeps the process inexpensive.

"The whole configuration process was a few conference calls," said Thompson. "We could specify the fields we needed to describe our foreclosure and eviction files and watch the adjustments being made."

A Single Solution

The flexibility in FileTrail accommodates expansion. Many clients use FileTrail in other departments, or to track other items, beyond the scope of the original project.

"Our initial project was focused on our biggest problems, which were in foreclosure and eviction," said Thompson. "We will eventually use FileTrail in our bankruptcy and litigation practices to solve secondary problems there."

A Happy Conclusion

Thanks to the 100% Pure Web technology and professional staff, implementing the FileTrail solution was pretty easy. The file tracking and request functionality has delivered a quick ROI for the firm.

"FileTrail has definitely been a great decision for the firm. The time-savings from ending searches for files alone has more than paid for the project," said Thompson. "But, we continue to find unexpected benefits and improvements resulting from the implementation of FileTrail."

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, call your local FileTrail representative at:

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