

A Leading Labour Law Firm

Business Issue:

Organizational growth straining existing records management system

Customer Profile



It's no coincidence that the most widely used file size is named for the legal profession. Files are the lifeblood of any law firm, touching every aspect of the business. Every day physical documents are created around case histories, client records, research files, Federal, provincial and municipal regulations, mergers and acquisitions, rulings, appeals, and writs. To effectively practice law, the ability to quickly access these documents is critical, and often means the difference between success and failure.

In the early 1990's, a leading labour law firm's success and rapid growth began to strain the resources they had around their existing records management structure. Getting people the information they needed when they needed it was becoming increasingly challenging, and the firm began to look for a partner that could provide them with the records management solutions they needed as the business evolved. After an extensive search they chose TAB, and in the years following the relationship has become a study in the benefits of a successful working partnership.

In the Beginning

TAB's legal specialist Scott Farnham met with key personnel at a leading labour law firm to better understand the existing system as well as future use requirements. Together, they created a detailed picture of how files were used in every business process. Like many legal firms at the time, the leading labour law firm's records personnel were creating files by hand, using a subject based classification system and a manual index card system to track files. This was not only time consuming, but created major inefficiencies in the file retrieval process as demand and volume increased.

Farnham and Kimsa came back with a solution that would

fundamentally change the way the leading labour law firm handled their documents. In order to make the firm's information store into a tangible asset, they recommended bringing their file classification system in line with their business functions, while simultaneously automating both file creation and tracking.

The Foundation

How information is organized dictates how that information is used. Putting a classification system in place that fit with the way the leading labour law firm did business was the first key step in improving their records management capabilities. With the information they had gathered, Farnham and Kimsa designed a system based on TAB's proven Functional Classification approach. This system would allow the firm's records management personnel to organize information on the basis of the actual business function, activity or transaction which resulted in the record being created or received in the first place. Organizing their information in this way provided the leading labour law firm with a simpler, easier to apply system that would make handling records more efficient.

Keeping Track

The ability to find files when they were needed was critical for the leading labour law firm, and automating that process would greatly improve this ability. Their manual index card system was simply not up to tracking an expanding volume of files in an increasingly fast-paced environment. With the new classification structure in place, Kimsa and Farnham converted the existing system to TAB's FileTracker Software. FileTracker is an easy to use, Microsoft® Windows® based software solution that uses barcode technology. The software gave the leading labour law firm personnel the ability to track file history at all times, from creation through active use, to archival storage and eventually to properly scheduled destruction. In a busy office where lawyers were continually pulling files, a centralized database pinpointing exactly where every file was at any given moment would be a tremendous advantage.

Automating Creation

Creating files manually was draining a lot of time resources away from co-workers, and TABQuik software was installed to address this. The Microsoft® Windows® based program would allow for the quick creation of customized, colour coded labels right from a desktop computer. This would free up a significant amount of time for the records management staff, allowing them to concentrate on more critical functions, while also ensuring consistency of labeling across the entire operation.

The Right Tools

Over the years, TAB and the leading labour law firm have put a new classification system in place, together with automated file creation and tracking. This has given the leading labour law firm the information infrastructure they needed to support their growth. As the leading representative says "Working with TAB has definitely improved the situation. Basically we had outgrown our existing set-up, and at different times we've needed to have something in place that would allow us to function at the level our business demanded. The ability to look at your computer and know where every file is, for instance, is a big plus. Things move quickly around here, a lot of times lawyers come in and pull their own files, and we need to stay on top of that. As our business has changed, the solutions TAB brought us have definitely made everything easier. We're more efficient."

The long association between TAB and the leading labour law firm has enabled both sides to learn from each other and work together effectively. TAB and the leading labour law firm continue to work together to improve the firm's records management capabilities as their ongoing success brings new information challenges.



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