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Business Sector Legal

Organisation Co-op Legal Services

About Co-op Legal Services

As one of the UK's leading multi-disciplinary legal firms with over 300 staff based across Manchester, Bristol and London, the Co-op Legal Services division ultimately engaged Restore Digital to provide a digital mail room solution in order to improve overall operational efficiencies whilst delivering enhanced customer service response times.

James Barron, Head of IT, explains their requirement:

"We had an inefficient process, it was not conducive with order trails or providing a service to customers. It was operationally inefficient."



01: The Challenge

Co-op Legal Services is divided into six legal practice service areas incorporating; Probate, Wills, Family Law, Personal Injury, Employment and Conveyancing. Their existing manual processes were presenting vast in-efficiencies, consuming essential staff resources in handling high volumes of paper processing thereby ensuing difficulties as a regulated organisation required to track audit trails.

Periodically, post would arrive at 8am, require prepping, sorting and distributing, not reaching the desk of the case handler until late in the day. Physically moving paper around buildings and across sites presented enormous risks in potentially losing documents, misdirecting mail and maintaining compliance regarding the sensitivity of documents and the information they contain. With the Probate section dominating 60% of mail received, coupled with the status of highest revenue earning business unit, faster process efficiencies were a must to improve pace and competitive edge.

Processing such large volumes of incoming mail increases the difficulty in identifying critical Court documents that require immediate attention. Missing an essential trial date would result in the firm having to absorb both the billed and court costs themselves rather than the client. In addition, not having the use of OCR (optical character recognition) eliminates the opportunity to search for words and key phrases, potentially indicating a high net value case, which could then be prioritised and immediately sent to an appropriate case handler.

The organisation required a digital processing system to enable documents to be scanned through the system quickly, progressing cases at a faster speed and delivering a more efficient customer service. By reducing the headcount within the post room, this would subsequently free up essential staff resources allowing them to be redeployed elsewhere within the business. They understood the benefits of adopting a digital mailroom and how this would improve identifying, sorting and the distribution of communication throughout the practice, not to mention gaining a paper free environment.



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Original Business Drivers Co-op Legal Services

- Efficiency Gains
- Customer Service Improvements
- Enhanced Operational Efficiencies
- Paperless Environment

The Experience Co-op Legal Services

James Barron, Head of IT, describes how Restore Digital have assisted the organisation's digital transformation;

"We engaged Restore Digital to provide us with a digital mail solution because we had an in-efficient process. What it's done for us, is it allows us to scan things quicker through the system and to reduce the headcount within our post room environment, redeploying staff elsewhere within the business.

This has increased operational efficiency, but most of all, because we are a regulated organisation, it allows a complete audit trail, particularly referring to sensitive documents which come in to us."



02: The Solution

Restore's professional services team worked closely with the Co-op Legal Services staff to tailor a bespoke solution, from concept through to design, development, testing, user training, deployment and go live support, we were on hand at every step of the process.

The Digital Mailroom solution implemented across the Co-op's 3 key sites combined multichannel capture, automated data capture and workflow technology to automatically prioritise, sort and route inbound communications regardless of the channel. This was integrated with existing MI dash-boards to allow the tracking of process efficiencies, cost savings and performance levels.

The new digital process flow enables effective automation across the business, improving the ability to pick up and trigger information whilst syncing with additional business units, cultivating the transfer and security of sensitive data. In addition, staff can identify the primary sources where post is received and approach these clients to request a digital communication transfer, thereby striving to meet the paper-less agenda set.

Key aspects of the Digital Mailroom Service:

- **Reduced costs;** Digitising and indexing business mail no longer requires staff members to manually process documents on-site.
- **Greater security;** Mail is diverted to our secure facility, providing a guaranteed safe place for sensitive documents. After being scanned, digital files are then accessible by only authorised members of staff, who can view a clearly defined audit trail to track when documents have been accessed, as well as identifying exactly who has retrieved them.
- **Saved space;** No more physical documents also means no need to retain space for incoming mail, allowing the business to remove the current mailroom and re-utilise the area for core business activities.
- **Faster retrieval;** All digital documents are indexed by a custom series of factors, suited to the business requirements. No more frantically searching through files to find one particular piece of information, a simple electronic search can access the data needed, quickly and efficiently.