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Lynn Mattson, Director of Finance
– Briggs & Morgan, Professional Association

kwiktag

Imaging for Law Firms

Briggs and Morgan,
Professional Association | Minnesota

Customer Profile:

Briggs and Morgan, Professional Association

Briggs and Morgan, a prominent Midwest law firm serving clients across the United States, has a long and strong history representing organizations and individuals in civil law matters. Today the firm has more than 175 attorneys who serve a range of clients including multinational corporations, business start-ups, commercial enterprises, nonprofit educational and charitable institutions, utilities, governmental agencies, public bodies and individuals. The firm has offices in Minneapolis, Minnesota and St. Paul, Minnesota.

The Challenge:

Time-Consuming, Expensive Document Retrieval Process

Briggs and Morgan was overwhelmed with paper – everything from reports and forms in the Records department to client bills, A/P invoices, contracts and month-end reports in the Finance department. The firm required a portion of a full-time staff position just to keep up with all of the rigorous manual filing of paperwork and the time-intensive document retrieval process.

In addition to the needless labor costs, Briggs and Morgan paid separately to house records at an off-site facility.

Attorneys need access to client bills or reports for various reasons. To gain access, the process required making a request and then waiting for the bill or report to be manually retrieved from an offsite location. In a face-paced and deadline-oriented law firm like Briggs and Morgan, this was simply unacceptable.

Briggs and Morgan needed to consolidate its paperwork electronically into one centrally-located, easily-accessible online system. The firm was looking for an economical way to access vital documents in a timely, more user-friendly manner.

Overview

Summary

Briggs and Morgan integrated KwikTag with its existing CMS Aderant financial applications to provide simplified access to all of the firm's important documents. Using integrated connectors for KwikTag to CMS Aderant provided by ImageTag's integration partner I-nnovate, more than a dozen employees in the firm's Finance department have been using KwikTag document imaging for over two years to access information in a quicker, more user-friendly manner. The system has enabled the firm to integrate its Finance department into easily-retrievable online access.

Departments

Finance

Documents Scanned

Reports
Forms
Client bills
A/P invoices
Contracts
Month-end reports

Solutions

KwikTag Basic

The Solution:**Less Storage Space + Less Staff Time = More Savings**

Briggs and Morgan was set on finding a solution to its expensive storage costs and voluminous paper management demands. While visiting a legal industry event, Briggs and Morgan participated in a KwikTag software demonstration. What was most compelling about KwikTag was that it could be seamlessly integrated into the firm's existing business applications.

After researching several other products, Briggs and Morgan decided that KwikTag was the system that would help solve the firm's document management dilemma.

"We were impressed with KwikTag's ease of use and the capability to integrate with our existing software. The real selling point was that KwikTag provided the capability to allow employees in other departments, who don't have access to our systems, to retrieve and view documents," said Lynn Mattson, Director of Finance, Briggs & Morgan.

Following a simple and timely installation process, Briggs and Morgan was up and running. The next step was training employees to use the system.

"We had no formal training plan," Mattson said. "Several key individuals were trained at the time of installation and have trained other users as needed. We have also taken advantage of some web-based follow-up training. Overall, implementation and training were complete within a few days. We virtually lost no production and saw no down time."

KwikTag users at Briggs and Morgan were delighted with the faster and easier access to documents.

"KwikTag has really increased our efficiency in that we can readily find documents, we have reduced the need for a filing clerk, and staff in other locations can easily retrieve documents," said Mattson.

Mattson estimates that the firm is saving approximately \$20,000 per year in staff salary costs since installing KwikTag almost three years ago. The firm has scanned over 99,000 documents into the system to date.

Briggs and Morgan plans to expand usage of KwikTag to other departments in the future. The company also plans on adding additional types of documents, such as journal entries and disbursement information.

I-nnovate Technology Solutions is a leading systems integrator and consulting firm specializing in solutions that optimize performance, productivity, and regulatory compliance for professional, corporate and government organizations. I-nnovate develops and sells connectors for KwikTag to CMS, Elite, and other applications.



Results

Reduced Storage and Staff Costs

Documents in the Records and Finance departments are now housed electronically, reducing the staff and storage costs for the firm. The firm estimates a savings of at least \$20,000 per year in staff time alone!

Improved Document Retrieval Process

Briggs and Morgan employees can now access documents electronically without ever having to leave their desks or waste precious time waiting for manual document retrieval.

Increased Productivity

Employees in the Records and Finance departments have instantaneous access to vital information that they need to complete their jobs.



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