



## HOW WE HELPED A LARGE MIDLANDS LAW FIRM WORK MORE CONSISTENTLY AND EFFICIENTLY

### THE CLIENT

Is an established firm of solicitors with seven offices across the Midlands. The firm offers a full range of services, ranging from conveyancing and commercial property, to litigation, wills trust and probate.

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### THE REQUIREMENT

Given the scale of their services and the associated paperwork, the firm had already produced and was continuing to produce a significant amount of physical files.

They open and close in the region of 12,000 files a year, which equates to around 100 archive boxes a month. Traditionally, these files were stored off site.

We were tasked with:

1. **Consolidating** all of their boxes of files, streamlining how they had been archived and introducing a consistent approach to filing and archiving across the organisation.
2. **Scanning** back files from their existing archive.
3. **Converting** all of the firm's documents into a digital format on an on-going basis.

### THE SOLUTION

We implemented a full digital conversion process for all of their files, which ultimately involved introducing a new company-wide approach to archiving.

Rather than creating files and then storing them in boxes, staff produce files, which we then collect and convert into digital files, using industry-leading data capture technology and software.



## ADDED VALUE

Getting everybody up to speed on the new way of working was a big challenge in itself due to the large number of staff working for the firm and the fact they are located at different offices.

Not only do we take all of their physical files and turn them into PDF-searchable documents, we run regular training sessions at all of the different offices to explain the new way of working to staff. And, if they have any queries, they have a dedicated point of contact, who they can get in touch with for help, whenever they need it.

Everybody at the company also has access to our records portal, which enables permission-based users to add, search and request files from a central archive. Meanwhile, we've set up a unique audit trail for every single file the firm is responsible for, which makes searching for files even easier and helps maintain GDPR compliance.

## RESULTS

The entire firm has literally changed its approach to storing documents, thanks to our expertise and guidance. The process, which is now consistent across the entire organisation, is far more efficient.

Staff are able to locate the files they need faster with minimal downtime. This is due to the unique audit trails we've implemented and the fact they have access to a central archive. They no longer have to wait for physical files to be returned from storage.

More importantly, the firm has reduced the amount of paperwork within each office due to our Scan Back service, which means their files are always available. This includes documents that are in the process of being digitised. If they are urgently needed, they can be digitised immediately upon request.

## The firm's document management processes fully embrace the digital era:

- All files are securely collected, tracked and audited using world-leading barcode technology
- There's a fully auditable process in place, from collection to digital conversion
- Files are individually prepared on a page-by-page basis
- The Scan Back service means the firm's files are always available, at the touch of a button
- All of the files are scanned and stored and confidentially shredded in line with ISO 27001, the international standard for information security

*'We have been working with Steve at CitiStore for a number of years. He has implemented a digital conversion process for all of our closed files, which has made us more efficient; we now have instant access to our archive. We receive a first-class level of service, Steve is always on hand to assist.'*

We're continuing to work with this firm on an on-going basis and are looking forward to enabling them to further refine and streamline the way they access and store their files.

**To find out more about how our services can help you reduce your reliance on paper files and work more consistently and efficiently, contact Steve on 01789 763170 or [steve.rose@citistore.co.uk](mailto:steve.rose@citistore.co.uk)**