MORGAN & MORGAN ...For the people

MORGAN & MORGAN®

Industry: Legal

Application: Inbound & Outbound Mail

Client Since: 2018

Locations: 60+ Nationwide

Docufree Services: Inbound Mail Scanning, Extraction & Verification, Integrated Digital Mail Platform, Automated Outbound Mail

Litify Products: Intakes, Matters, Docrio

> "Moving to Docufree's automated Digital Mail Platform has enabled us to have total visibility and accountability into every piece of mail that comes into the firm. Paralegals and staff are processing mail in seconds and spending more time working on revenue-generating activities and not handling inbound and outbound paper documents."
>
> Ryan Colbert, CIO

Morgan & Morgan
Successful Verdict for Docufree + Litify Digital Mailroom

Being able to manage paper in an efficient way is critical for legal practices. However, this can be a daunting task in an industry that has long been known for its paper-driven processes and offices lined with cabinets full of case files. Law firms produce documents—lots of them—and with this comes plenty of challenges in locating the right piece of paper at the right time.

Unfortunately, many firms still operate with the same physical paper mentality they've had for decades, resulting in misdirected

deliveries, delayed and misplaced mail and checks, and paralegals spending too much time scanning, uploading, naming and attaching documents to the case management system.

Morgan & Morgan, the nation's largest personal injury and consumer protection law firm, set out to find a better, more efficient way to manage paper processes.

"As a firm, we've been on a digital transformation journey with the goal to become the Google of law firms," said Morgan & Morgan CIO Ryan Colbert. "This required us to think outside the box and adopt new technologies and practices that are scalable and that empower our team to be the most efficient advocates for our clients as possible. In this case, digital mail looked like a great way to increase our efficiency, accuracy and promptness in mail delivery."

With 60-plus locations receiving over 80,000 pieces of case-related mail per month, this was no small undertaking.

After extensive research, the firm hired Docufree and implemented its Digital Mail Platform. "Docufree had the expertise, technology, infrastructure and direct integration into Litify, our case management system, to help make this happen," Colbert said.

What Docufree Does for Litify Users
Docufree provides automated inbound and outbound mail processing for law firms like Morgan & Morgan. The firm uses Docufree to receive, open, scan and track all incoming USPS inbound mail, automatically capturing each document and delivering it to the right place in Litify. All paper mail is first sent to a Docufree facility where it is opened, prepped and ready for scanning and post-processing. After the images are created, Docufree tags each document with the matter number that is associated with each case. Docufree then uploads and routes the mail to the relevant matter file inside of Litify, and notifies the correct person inside the firm. This includes important checks and other time-sensitive material.

docufree | LITIFY

"In the old days of paper mail, you really had no idea when a piece of mail arrived inside your building or how many other desks it went to before it arrived to you."

The Docufree Digital Mail platform directly links to Litify's document management and generation solution, Docrio, so when a case is searched, all documents and correspondence for that case appear in one view.

Improved Efficiency & Time Savings
Colbert said that prior to the implementation, staff members were spending 30 to 45 minutes per day looking at their inbound mail, opening the envelopes, scanning the mail and posting the mail to the relevant matters in Litify. Now, with the Docufree integration, they are spending about five minutes a day on these tasks.

"Instead of everyone processing their inbox full of postal mail, they can now process mail already pre-tagged and coded for the case and the client directly from the Litify platform," he said.

Reduced Space
The change is also visual. Prior to implementation, every wall on every floor of Morgan & Morgan's offices were lined with file cabinets full of documents. Today, the number of needed cabinets has been drastically reduced.

Better Workflow Management
The ability for lawyers and paralegals to focus on the task at hand has greatly improved with the increased efficiency provided by Docufree. "When our team closes a document and posts it to the case, they really never have to go back and look at that document again, versus the old way where they opened everything in paper form, maybe triaging and handling an urgent item before they even got to scanning and posting. Processes are now streamlined and more focused," said Colbert.

Advanced Process Transparency
Internal business process transparency has also improved. "In the old days of paper mail, you really had no idea when a piece of mail arrived inside your building or how many other desks it went to before it arrived to you," said Colbert.

The ramifications of misdirected, delayed, or misplaced checks or mail are significant. Certain pieces of court correspondence are extremely time sensitive, requiring a response within ten days. If the letter is not received, the law firm is out of compliance. "It is one of the biggest challenges and biggest business risks we face in this industry," added Colbert. "In the Docufree world, we have complete visibility once a piece of mail has arrived, including into all the associated touches. We continually work with Docufree to increase accuracy to reduce the number of times those pieces of mail have to be touched."

This transparency has already played an important role during a few instances where DVDs or other items were misplaced. "We actually have a digital copy of the DVD, because Docufree creates it as part of the inbound mail process," said Colbert. "So even if an original is misplaced, we're able to produce a copy and deliver it to the attorney who needed it."

Certified Secure Process
Security and compliance are of utmost importance at Docufree, from their physical facilities and staff to their technology. Every aspect of their business is third-party audited to ensure their infrastructure and services meet today's evolving compliance standards. Whether it's credit card information, protected health information, or in the case of Morgan & Morgan, personal identifiable information and legal documents, Docufree exceeds the industry standard with certified PCI DSS, HIPAA / HITECH, and SOC2 Type II compliant processes that secure highly confidential information—from the time a document enters their facilities to any time it is accessed in the cloud.

> "With direct integration into Litify, Docufree makes it easier to meet time-sensitive deadlines for getting out key documents. Tracking is also much easier. A dashboard provides the status of every piece of outgoing mail with digitally captured milestones. This automation has greatly improved efficiency."

Remote Office Support

When COVID-19 hit, Morgan & Morgan was ready. "Digital mail was a huge help in cases where we needed to strategically send an entire office home for a period of time," Colbert said. "Docufree was able to accommodate us with a seamless transition and mail delivery consistency while working remotely."

Outbound Mail Advantages

While inbound mail improvements have been substantial at Morgan & Morgan, Colbert points out that outbound mail processes are also much more efficient. By leveraging APIs with Docufree, the firm's staff can now select a document, select the intended recipient and choose a class of service, such as "certified", all from Litify, their case management platform. Then, with a simple click of a button, Docufree automatically mails the document.

"This has been a huge time saver for us, especially when it comes to certified mail," said Colbert. "With direct integration into Litify, Docufree makes it easier to meet time-sensitive deadlines for getting out key documents. Tracking is also much easier. A dashboard provides the status of every piece of outgoing mail with digitally captured milestones. This automation has greatly improved efficiency."

As Morgan & Morgan continues to roll automated inbound and outbound mail processing to all of their offices the firm also has a long-term plan to incorporate Docufree company wide. It also plans to incorporate Docufree with other technologies such as OCR and data-entry automation on the inbound portion of mail.

The Bottom Line

The benefits to Morgan & Morgan are extensive:

- Increased accuracy and promptness of mail delivery
- Reduced paper and processing times, improving efficiency and saving space
- Remote access to incoming mail and automated outbound mail services directly from Litify
- Complete visibility with tracking, audit trails and history of every document and check received

About Morgan & Morgan

As American's largest plaintiffs' law firm, Morgan & Morgan has more than 550 attorneys across 17 states that represent clients in over 40 practice areas, including national mass torts and class actions, labor and employment, civil rights, personal injury, medical malpractice, product liability, business litigation and insurance disputes, among others. Morgan & Morgan has fought on behalf of plaintiffs in major national litigation surrounding the Deepwater Horizon oil spill, the Yahoo! and Equifax data breaches, the Merrimack Valley gas explosions, Monsanto's Roundup and many more. Additionally, Morgan & Morgan's Business Trial Group is one of the only firms in the country that handles business litigation exclusively on a contingency fee basis. The firm has recovered more than $7 billion for over 300,000 clients.

About Docufree

Docufree is a business process services provider with leading capabilities in large volume document conversion, data capture, process automation, analytics and enterprise information management. Docufree securely manages and modernizes data interactions among humans and systems to create value for both clients and their customers—from digital on-ramp preparation to human resources, invoice processing, customer care and distributed payments administration.

About Litify

Litify empowers legal teams to replicate their best practices at scale and deliver optimal outcomes for their clients and businesses with the most flexible and fully integrated legal technology platform. Built on Salesforce.com, Litify is transforming the legal industry with true transparency, automation, and real-time actionable insights that help law firms and corporations scale and increase their bottom line.

docufree | LITIFY