

## success stories

**MORGAN & MORGAN** ...for the people



“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 Digital Mail

**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

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 approximately 50,000 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 and infrastructure to help make this happen,” Colbert said.

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### What Docufree Does for M&M

Docufree provides automated inbound and outbound mail processing for 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. 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 routes the mail to the correct person inside the firm, based on the case associated with each piece of mail. This includes important checks and other time-sensitive material.

The Docufree Digital Mail application directly links to Morgan & Morgan's case management platform so that when a particular case is searched, all documents and correspondence with 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 their cases in the case management system. Now, with Docufree, 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 their Docufree inbox, which is already pre-tagged and pre-coded for the case and the client,” 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 in contempt and 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.

“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.”

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.”

#### 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 from the repository, select the intended recipient and choose a class of service, such as “certified.” 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. “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
- Significantly less time processing mail, improving efficiency
- Enabled remote access to incoming mail for employees working from home
- Complete visibility with an audit trail and history of every document and check received
- Automation and tracking of outbound mail
- Office space savings

#### About Morgan & Morgan

Morgan & Morgan is a leading personal injury law firm dedicated to protecting the people, not the powerful. It takes pride in the fact that it does not represent insurance companies, hospitals or other large corporations. Its law practice is limited to the representation of the people, covering a wide range of personal injury and consumer protection cases.

With decades of experience, more than 500 lawyers and a support staff of over 2,600 employees, Morgan & Morgan has helped more than 100,000 clients nationwide. In its efforts to protect the people, the firm’s attorneys have established themselves among defense attorneys and insurance providers alike as leading trial lawyers.

#### 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.