

7 Reasons to Upgrade to a Digital Mailroom Operation

Legal Technology White Paper

- Digital distribution of daily mail is mission-critical
- Legal mail must be delivered to the DMS, not the email system
- A digital mailroom operation can be transformational

Airmail2 Digital Mailroom

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A Permanent Change to How Your Firm Operates

In the New Normal a law firm needs a formal Digital Mailroom operation, not the current scan-to-email workaround, which was a triage solution at the onset of the COVID-19 crisis. Attorneys and staff working from home must have reliable, secure delivery of daily mail which is arriving at the main office.

The Digital Mailroom remains essential when the workforce returns to the office. A significant part of the workforce will work from home semi-permanently, and it isn't viable to hand deliver paper mail for those in the office today, and also provide an alternate digital delivery system for those at home.

Law firms are critically dependent on in-bound paper mail from clients, courts, opposing counsel and research sources. Some of these paper mail items mandate a calendared response, or contain sensitive client information, or crucial matter content. Starting now, inbound paper mail needs digital delivery, all of the time, for everyone.

The good news is that work in a home office forces digital behaviors, so long-delayed digital initiatives will now accelerate. And a Digital Mailroom, run optimally, will routinely digitize the biggest remaining flow of inbound paper documents - *daily mail*. A Digital Mailroom now drives your firm towards a conclusive digital transformation.



OPTIMIZE
WORKFLOWS
AND BATCH
THE WORK

DIGITAL DELIVERY OF MAIL TO THE DMS



7 Reasons to Upgrade to a Digital Mailroom Operation

Here's a quick test to rate your firm's need for a Digital Mailroom. How many of these 7 challenges does your firm experience with its current mailroom scanning operation?

1. The mailroom scanning operation is not integrated with the document management system (DMS), which is the final destination for legal postal documents. Scanned mail items go to email inboxes. How and when these PDFs get filed in the DMS requires extra steps and work, and this process completion isn't consistent, isn't enforced, and isn't managed.
2. Scanned mail recipients - attorneys and legal staff - now must use their email inbox as a workflow tool to process daily mail. New work and diligence to monitor, file and delete inbox attachments is pushed into the legal practice.
3. From an IT and security perspective, scanned legal mail ends up as unnamed PDF attachments stored in the email server, clogging storage space and compromising security and compliance for the related client information.
4. Without regimented quality controls to check that all inbound mail documents have been scanned and delivered, and without checks for image quality, page count, etc., there is no confidence to schedule shredding of daily mail after scanning. The paper mail is stacking up.
5. After scanning, the physical paper mail is still manually distributed to attorneys' or assistants' desks, or stored in a makeshift file area, replicating the labor of the previous paper-based operation, in addition to the new labor for scanning operations.
6. Too many people are involved in getting the daily mail scanned and distributed, and in managing exceptions before and after scanning. Staffing requirements can change daily with mail volumes. Daily work depends on a particular mailroom clerk's knowledge of process deviations. The staffing of mail processing for multiple offices is problematic.
7. Attorneys and staff have complaints about the mail scanning results, such as delays, inadequate notifications, misdirected distribution, and scanned file quality issues.

Requirements for a Digital Mailroom Operation



Upgrading to a structured Digital Mailroom operation surfaces specific requirements, which should be documented and accounted for.

Productivity, security and reliability are essential. Here is a list of categorical needs that should be refined into specific requirements for your firm's Digital Mailroom.

- **Productivity** - deadline-based handling of daily mail means human and software workflows must be optimized, and built for peak day volumes. Work batching, process simplicity, and staffing consistency are key.
- **Security and Information Governance** - legal mail items contain client information, and the methods for processing them digitally should incorporate the same standards applied for all client data at the firm. These standards are already handled by the DMS implementation, and that model should be applied to the mail room.
- **Reliability** - a Digital Mailroom must be a structured, measured operation, so that daily digital mail delivery is reliable and scheduled. Auditing and reporting are critical to maintaining operational stability.
- **DMS integration** - scanned legal mail should be delivered to the DMS, not to an email inbox. Leverage of DMS access, process and security locks down integrity. Smart notifications to recipients of DMS deliveries are a necessary part of the operation.
- **Multi-office support** - across offices, variability in staffing, mail volumes and workplace accessibility must be accommodated. Deployment across offices should enable use of in-place scanning devices, web-based software, existing DMS integrations and simple training. A digital mailroom should support plans to centralize mail receiving across offices.
- **Quality controls** - each scanned mail item should undergo formal quality control checks, built into the process, to ensure complete and usable image files are delivered to waiting attorneys. Every paper mail item that enters the process should be tracked to process completion. Scanned paper disposition (staging, shredding, retention) must be built into the operation. A help desk should be part of the operation.

Scan to Email Won't Cut It!

When the pandemic sent the workforce to home offices, most law firms quickly started scanning to email to get the mail out digitally. Scanned mail items show up as undescribed PDFs in a user's inbox.

But email is a poor workflow management tool. Email is a weak security and compliance link in the lifecycle of matter documents and client information.

Here are some key reasons to avoid scan to email for legal documents:

- Email attachments are stored residually in the email server, unmanaged. Sensitive client information delivered as email attachments floats and bloats in the email server, violating basic principles of information governance.
- An email inbox is not a workflow tool, and it cannot be shared with other workers to manage process. After scans are delivered as email attachments, there is no way to monitor that all documents are properly processed, or even reviewed.
- Scans of large documents can create file sizes beyond the set limits for email attachments.
- Email is a key source of phishing and email attachments are a key source of malware. Email attacks are constantly evolving because email opens a primary vulnerability for IT systems. So, adding new business process into email is a bad idea.



DAILY MAIL IS MISSION-CRITICAL

Assess the Current Mailroom Operation

Step 1 on the path to an upgraded Digital Mailroom operation is to assess the current one. This assessment helps finalize requirements and enables your firm to measure improved outcomes. Here are the core functions to delineate:

Quantify volumes:

- % of daily mail that is legal, administrative, junk
- # of daily mail items and average # of pages
- per office breakdowns for each data set



Map current process:

- Steps and man hours for the entire mail scanning operation
- Additional steps and procedures for mail recipients to manage digitally received mail items
- Steps, man hours, and any deferred work (staging, shredding) to manage paper post-scanning
- Determine # of workers involved in each step
- Include per office breakdowns for each data set

Identify process faults and needed improvements:

- Daily digital mail delivery timeliness
- Process quality controls
- Staffing
- Security
- Paper disposition



Summary

Now that the New Normal is taking shape, it becomes obvious that digital mail distribution needs to transform from makeshift heroics to an organized, secure and stable operation. Attorneys and staff working at home or in the healthy offices need daily mail delivered digitally. The shift to a distributed workforce has not changed clients' minds about how they'd like their information handled, secured, and governed. A modern Digital Mailroom is an essential operation for the New Normal, and it can drive the last mile of a law firm's Paper2Digital transformation.

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About Airmail2

Create a digital mailroom with a productive, secure and reliable workflow engineered for law firms. Airmail2 is digital delivery software that works with barcoded Postmark Stamps to enable stacks of mail to be scanned directly into a document management system. For more information, please visit docsolid.com/software/airmail2.



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