



Major U.S. law firm will save millions in storage costs **with Nintex**

A Nintex-based solution is being used to reduce offsite file costs by 75% and limit discovery exposure for clients.

Organization

Law firm

Industry

Legal services

Country

United States

Business situation

The law firm identified 100k+ boxes of client files that could be returned or destroyed—if a practical process could be created to do so.

Solution

The firm used Nintex to create a Legacy File process that automates and streamlines the process of identifying qualifying files, notifying clients, and tracking the process.

Benefits

Reduces file inventory by 40%

Reduces offsite file costs by 75%, saving \$6 million

Reduces client exposure to discovery motions

The tidal wave is here

The tidal wave of change facing law firms—and professional services firms more broadly—is sinking the ones that can't adapt to new markets and high customer expectations. The smart firms are finding new ways to work with leaner operating costs, while increasing their focus on client service.

A major U.S. law firm with offices throughout the U.S., has long taken a technology-driven approach to scaling up its growth, controlling costs, and delivering ever-higher levels of client care. In 2019 it turned its attention to one of the banes of almost all law firms: the costs and liabilities of file storage.

In May of 2018, the firm adopted a new client records retention policy, allowing for the destruction of client records 10 years after a case is completed, pending client notification. Without a policy in place, off-site records storage had grown exponentially at commercial records storage facilities supporting its offices. Moreover, the firm recognized the considerable risk to both the client and firm when client records are retained beyond the legal and statutory requirements.

Making the impossible possible

“Nintex made the impossible possible. There’s a reason we never implemented a process to destroy or return old files before Nintex.”

— Legal Records Analyst

Shortly after the policy was adopted in 2018, several members of the Records Management Team began working with the firm’s General Counsel to develop an implementation plan for the new client records retention policy. The design of the plan would need to address any risk issues, as well as be as efficient and accurate as possible. The result was a process that kicked-off with sending a notification letter to current and former clients for which the firm was storing inactive records. Given the volume, it was immediately obvious that some type of automation would be necessary to generate the notification letters and associated list of case files identified as eligible for return or immediate destruction.

The first attempt at automation was to leverage standard mail-merge functionality (using Excel) to generate the letters and envelopes to inform clients of their options, but after a proof of concept involving several hundred letters, it became clear that managing the process in just one of its offices would take thousands of staff-hours and years to complete. A firm-wide solution wasn’t possible.

That’s where Nintex came in.

“Nintex made the impossible possible,” says the records analyst involved in the process. “There’s a reason we never implemented a process to destroy or return old files before Nintex.”

Cutting costs by 75%

With Nintex, the firm now has an efficient and scalable legacy file process and has begun implementing it across all offices at an estimated 75% reduction in labor and cost over the mail merge options. It will take several years before savings are realized, but over time the cost to store records in off-site warehouses will naturally be reduced as well.

The legacy file process uses Nintex Workflow to pull client and matter data from separate databases into SharePoint, which the firm was already using and which enables records managers to track the process. Nintex Workflow also cleans up addresses, removing blank lines, updating addresses, and cross-referencing parent-client names where appropriate.

The firm uses a Nintex Form to show the records managers the client data, related matters, and additional tracking fields.

They review the data and initiate a workflow that uses Nintex DocGen® to create customized client letters with an addressed envelope, table of matters eligible for destruction, and response form. The workflow also populates relevant data to a client-letter library.

“Creating our legacy file process with Nintex was very quick; it only took a couple of months,” says the process developer. “Everything about Nintex is easy and intuitive—both for developers and for our users.”

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The firm plans to deploy the solution beyond the two pilot offices, to all its US offices before the end of 2021. And the firm’s use of Nintex won’t end there. Already, the Records Department is working with IT to use this experience—and Nintex—to streamline additional records and information governance processes in the future.

About Nintex

Nintex is the global standard for process management and automation. Today more than 10,000 public and private sector organizations across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

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