

# CASESTUDY





# Out With the Old

Evans & Dixon, L.L.C. bolsters staff efficiency and its bottom line by addressing its pressing need for new digital dictation software.

Insurance defense law firm Evans & Dixon, L.L.C. knew that it needed a new dictation method – but finding one wouldn't be simple.

The St. Louis-headquartered firm, which specializes in workers' compensation and civil litigation defense, needed software that would operate with its current computer system and work in its Springfield and Kansas City, Missouri, satellite offices.

Once it found compatible digital dictation software, getting the new system up and running became a high priority. Given the speed and scope of the implementation, several things could have gone wrong: Computer crashes, long transcription delays, lost files.

But – due to the combined efforts of Evans & Dixon, its technology consultant and the dictation software provider – not a single thing did.

Why? Two reasons: Careful selection of extremely user-friendly software, and a considerable amount of preparation.

Greg Godfrey, Executive Director, EVANS & DIXON, L.L.C.



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### THE OLD WAYS

Before adapting to the new digital system, Evans & Dixon used tape dictaphones, which posed many problems.

"[Staff] would reuse the tapes until they broke or got eaten, and then you had to call somebody to splice the tape and would still lose part of the dictation," said Corinne Rainey, who was one of Evans & Dixon's two pre-digital dictation IT help desk employees.

Even if the tape did make it through the recording process in one piece, transporting it from the attorney to the support staff was a cumbersome process.

"We'd record and have to ferry the tape around," said Talmage Newton, an associate who specializes in labor employment and construction cases and submits about five to 10 dictation projects a week. "There were piles of tapes everywhere. That was certainly not an efficient system."

And it wasn't a system the firm could maintain. The firm's supplier announced two years ago that it would begin phasing out the tape dictation machines, and clients had begun sending audio files digitally.

"We actually had to record it from the computer to the tape and then let the secretary [transcribe] it," Rainey said. "[And we realized], that's the wave of future – insurance companies are e-mailing audio files, they're no longer sending tapes."

The future of Evans & Dixon's dictation – which Human Resources Director Cindy Baumann says represents 75 to 85 percent of the legal secretaries' jobs – was suddenly clearer.

Enter St. Louis-based Sextant Technology Partners, which the firm had hired as its technology management and support source several years ago when it was lacking an in-house Chief Information Officer.

The need for digital dictation technology arose in one of the quarterly big-picture planning meetings that Sextant, which now serves as more of a technology consultant, holds with the firm.

"The technology was changing," said Juan Carlos Antolinez, Sextant's business technical advisor to Evans & Dixon. "We needed to make a change."

### SEARCH FOR A SOLUTION

To find the best digital dictation software, Sextant researched vendors, did product demonstrations, and talked to clients with environments similar to Evans & Dixon's.

By mid-summer last year, Sextant was delivering options of "who was playing in the marketplace." One specific type of digital dictation software, created by a company called BigHand, seemed to be the best fit for the firm.

Sextant read case studies of "seven to eight" of BigHand's former clients and called "two or three, talking to IT managers or the administrative officials who were over the secretaries for a workflow point of view," said Sextant Client Relations Manager Lynn Weber.

Evans & Dixon's computer system runs on a Citrix system, which networks the PCs. The system is hugely beneficial for IT help and maintenance because it allows the staff to connect to users' screens from remote locations to view issues, but it posed a problem as the firm shopped for digital dictation solutions – until Sextant found BigHand.

"There was nothing out there that would work in the Citrix environment in terms of sound quality," Rainey said. "When BigHand came out with client software that would work with Citrix, we were ecstatic."



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#### THE DIGITAL ADVANTAGE

With BigHand software, users can dictate and save files directly to the network using a handheld microphone, headset, remote device, PDA, or cell phone. A compressed and encrypted sound file is then transferred to the support staff.

With offices in Chicago, London, Sydney, and Toronto, BigHand's software is used by more than 650 firms and companies worldwide.

"Because it is a server-based solution, it allows staff to become more time efficient," said BigHand's U.S. Technical Manager Ed Keen. "A secretary handed a tape toward the end of the day doesn't know how many dictations are on it. Now the work is coming through throughout the day, and [the secretary] can plan the day more effectively."

The software's time-saving advantages are a huge plus for a law firm – especially Evans & Dixon, which had recently grouped its legal secretaries into teams to better support its attorneys and, in turn, help the attorneys to better support the firm's clients.

"There is a focus on the relationship building inside these firms," Weber said. "People have a lot of choices out in the marketplace. [A firm's] ability to be able to deliver high-quality, superior service to a client is an overarching goal. The clients can shop – so they're looking for the people who know their businesses best and can deliver in a knowledgeable, cost-effective manner."

"There is obviously a focus on billing," Weber said. "Every minute needs to count. With something like BigHand as a solution for this particular client, it allows them to be more efficient, particularly in the hand-off of work to secretaries."

"I utilize digital dictation more than most attorneys in the firm," said Newton, who noted that he was not too entrenched in the old system because he has been at the firm for only 10 months. "They didn't have any dictation technology at the old firm I was at;

I was typing all my own letters and motions. I am significantly more efficient than I was."

Protecting and backing up files is also quite easy.

"BigHand's software is an n-tier, service-oriented application, compatible with Windows, Thin client, BlackBerry, and Windows Mobile Operating Systems," Keen said. "Using BigHand, nothing is ever lost or accidentally deleted; on the service side, it's a solution you know is always going to be very safe and secure. It's very easy to backup, and disaster recovery is 100 percent covered."

#### TRY BEFORE YOU BUY

Before trying the software at Evans & Dixon, Sextant did a live test trial at its office.

"As soon as we knew it would work, we got the approval from CFO for the money to purchase the product," Rainey said. "We had to get a separate server because audio files are so large. And there was the equipment on top of that – portable recorders, new headsets, and foot pedals that plug in via USB to the computers."

The process of getting approval, purchasing, and installing the new server took about two months.

The cost, Rainey said, was considerable because the firm also ordered new computers before implementing BigHand. The previous PCs didn't have CD-ROM drives or speakers.

However, the firm was able to reduce costs associated with the new software by linking the remote offices into the St. Louis server instead of purchasing additional servers, Keen said.

To eventually get the firm's more than 60 attorneys and 70-plus secretaries up and running on BigHand software – a process that Keen said took "no longer than two to three months" – the new system was rolled out in phases. A trial group in the firm first tested it for 30 days in St. Louis.

Mike Banahan, Partner, EVANS & DIXON, L.L.C.



Because I have the largest volume, they thought if [the new software] worked for me, it would work for all. And it went very smoothly.

"We ran a pilot to start with, which involved 14 users," Keen said. The test group used the system from the second week in December through the first full week in January.

"Because I have the largest volume, they thought if it worked for me, it would work for all," said Evans & Dixon Partner and test group member Mike Banahan, who handles worker's compensation cases for the firm. "And it went very smoothly."

That, Rainey says, was the whole point of the exercise.

"It worked to have [the test group] have several weeks to use it before we rolled it out to the rest of the firm," she said, "because if there had been a problem, it would have come out then."

#### A SEAMLESS TRANSITION

After the trial group test concluded, every two weeks an additional team within the firm was taught how to use BigHand. Training took from 15 to 25 minutes for

each secretary and less than half that time for each attorney. The entire process went so well that the implementation time was cut by 30 days.

"We realized as the second team came on that by the end of February instead of March we could bring everyone on," Weber said.

Rainey spent two days in early January at the Kansas City office teaching the new system to the attorneys and secretaries and completing other tasks; she then drove to Springfield and trained the staff in that office.

Weber and Antolinez started visiting the St. Louis office each week after the trial use began in December.

"We literally walked the floor from December to now, every week, to talk to the end users," Weber said. "We were able to share tips like 'You need to wait until that red light comes on to dictate' because secretaries were saying, 'Hey, words are getting cut off.'"

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Cindy Baumann, *Human Resources Director*, EVANS & DIXON, L.L.C.



In January, not everybody was on the [BigHand] system; but I have February, March, and April to compare by, and I can see that the secretaries' performance ratios have improved from February to now.

BigHand also remained involved throughout the training and implementation process, which Sextant said was invaluable.

"As we added people and load to the project, they said [things like] 'Let's go back and look at server performance to make sure there are no negative effects,'" Weber said. "And there never were. We expected [the process] to go smoothly. It exceeded our expectations."

#### MAKING EVERYONE MORE PRODUCTIVE

A folder on the server houses each team's items; everyone has access to the folder.

"Say there is an assistant who isn't here," said Cindy Shands, one of the firm's legal secretaries. "Files are usually marked by the attorney if it is a rush or if there is a due date that needs to be addressed. The team leader checks on that type of thing all day long."

The new software also has helped support staff members visualize their individual workloads.

"You're able to prioritize what you have because you can see at a glance what's out there and what needs to be done," Shands said. "Before, you'd have to listen to the whole tape to get what you wanted to get to"

The attorneys – particularly the firm's younger ones, who were known to handle their own transcriptions – have also found the technology can help them manage their time.

"They're younger and used to all these tools. They IM everybody and have their Facebook and MySpace accounts, and [don't feel they need] to use a secretary," said Executive Director Greg Godfrey. "But now it's so easy they dictate a three-sentence e-mail."

Newton agrees.

"It's a time-saving device," he said. "The simple fact is I can dictate a business letter in two to three minutes that would take me 10 to 15 to type. It allows me to cram a lot more work into the day than if I were typing every document myself or running tapes back and forth."

#### A CASUALTY OF PROGRESS

As with many efficiency-increasing practices, the new digital dictation software reduced the firm's support staff needs.

"We were not sitting at table at Evans & Dixon saying, 'Cut three positions,'" Weber said. "One of the big selling points was not only replacing aging, outdated equipment, but realizing efficiencies you don't currently have."

"There are pros and cons," Godfrey said. "We've been able to reduce staff 20 percent already. The anticipation was yes, it will help us to realign resources."

The reduction increased accountability, Banahan said.

"I can check the hours of dictation, minutes typed, number of files handled," he said. "If you get backed up and call somebody and say, 'Hey, I'm backed up,' now they can say, 'Hey, what are you talking about, in the last two days you've done two [transcriptions].'"

The reductions may have even helped the support staff feel recognized for hard work, Godfrey said.

"If people get worried about what is going to happen with morale because of staff reductions, they are concentrating on the wrong thing," Godfrey said. "Get rid of dead weight, and the people left respond better. They think, 'Hey, this place actually cares, we're all pulling this cart together now.'"

The system has helped some legal secretaries, like Jana Moran, see which teams need more assistance.

"Because of the new digital dictation and the 'team' concept, it is helping everyone realize getting the work completed is a group effort," Moran said.

And there's a payoff for getting the work done: The firm recently instituted an incentive program to give assistants extra days off per quarter if they successfully work as a team on dictation. Although it's too new to see how much it will be utilized, Banahan said the staff is "cautiously optimistic" about the program.

The support staff is also generally positive about the new software.

"When you're working on tapes, you don't see the decrease in how much work you have left out there," Shands said. "When you see your work getting smaller and smaller on screen, it gives you more incentive to keep going – [you] see light at end of tunnel! Before, you just saw stacks in front of you."

## RESULTS AND ROI

Implementation of the dictation software has given attorneys at Evans & Dixon more flexibility.

"What's really nice is that our attorneys spend a significant amount of time in the courthouse and on the road, and because the device is portable, you can go home, go to your kid's ballgame, be thinking about work, pull that out, and still get your job done," Godfrey said.

As a result, the software has made their assistants' jobs more efficient as well.

"The biggest change is that it is now easier to do work for other individuals when they are not in the office," said Evans & Dixon Legal Secretary Heidi Szolga. "You are typically not so bombarded with work when someone comes back from being out of town, as they have been able to send it to you while they were away."

Although the system is still fairly new, the firm has already seen results.

"In January, not everybody was on the [BigHand] system; but I have February, March, and April to compare by, and I can see that the secretaries' performance ratios have improved from February to now," Baumann said.

The firm has gone from turning around documents in four days to less than one day, according to Weber. "There is no backlog," she said. "That is a remarkable achievement."

BigHand continued its involvement in the implementation until late spring and is now offering "tech support as needed," Keen said.

And Evans & Dixon is not quite done altering its technology, as the firm plans to move off of Word Perfect soon. Although the decision to do so was made independent of the digital dictation system's implementation, the new software's overwhelming acceptance didn't hurt.

"The fact that this project went well makes it all the easier to convince people change is not so bad," Godfrey said.

Certainly not change that improves time management, staff supervision, and workflow – all of which helped the firm feel confident about its move to digital dictation.

"It's not one of those things you take lightly," Godfrey said. "You research it and make sure it has a good ROI. But it paid for itself in first four months."

That is one of the reasons Godfrey says he would recommend digital dictation to any firm.

"I would strongly encourage [any firm] to add anything that is an efficiency tool that will reduce your turnover," he said. "You'll have better people employed. Embrace change; don't fear it – and it will definitely improve the bottom line." \*

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## LEARNMORE

### ALA Resources

A CD-ROM from the following ALA Webinar is available for purchase at [www.alanet.org/education/teleseminars/default.aspx](http://www.alanet.org/education/teleseminars/default.aspx):

- "Technology Update: Where Are We Going?"

The following articles are available in the Publications section of ALA's Web site at [www.alanet.org/publications/legalmgmt.aspx](http://www.alanet.org/publications/legalmgmt.aspx):

- "Dictation Done Right," by Liz Brown, May/June 2008 issue of *Legal Management*
- "Talk of the Promised Land," by Steve Butterworth, July/August 2007 issue of *Legal Management*

### On the Web

- BigHand Digital Dictation – [www.bighand.com](http://www.bighand.com)
- "Thinking About Digital Dictation" – [http://greatestamericanlawyer.typepad.com/greatest\\_american\\_lawyer/2006/02/thinking\\_about\\_.html](http://greatestamericanlawyer.typepad.com/greatest_american_lawyer/2006/02/thinking_about_.html)

### On the Shelf

The following title is available for purchase or download through many online retailers, including [www.amazon.com](http://www.amazon.com):

- *The Digital Practice of Law*, by Michael R. Arkfeld