**Case Study**

# Shulman Rogers revitalizes their Trusts and Estates department with AccuRoute.

**COMPANY**
**Shulman Rogers**
**Potomac, Maryland**
**shulmanrogers.com**

Shulman Rogers is committed to client service. The firm's roster of highly skilled attorneys and dedicated staff are guided by a relentless focus on problem solving and an underlying compassion for clients and the community.

SHULMAN ROGERS

**Shulman Rogers** used AccuRoute to improve access to archived documents used by the firm's Trust and Estates department. When it comes to wills and estates processes, legal teams typically prepare documents that are archived for years, or even decades, before retrieval. To enable faster client service, the firm integrated AccuRoute with iManage to give attorneys instant access to over 20 million documents and improve service times.

# How can busy legal teams improve access and accelerate service to clients?

### Shulman Rogers needed to improve service turnaround times.

When clients contacted Shulman Rogers years after their documents were originally executed, inquiries were routed to the chair of the Trusts and Estates Department, who then tasked an assistant with locating the necessary files. This process could take up to 48 hours. Attorneys would review the documents to familiarize themselves with the case, then answer client questions and email copies of any relevant documents. The whole process took up to 72 hours of unbillable time. With the right tools, the firm knew they could better serve their clients.

### Upland AccuRoute allowed teams to scan directly to iManage retrieval.

Administrative staff can scan directly into the iManage client-matter folders using barcoded routing sheets with embedded instructions to ensure that every document is routed to the right destination.

*"Converting years of paper into searchable, instantly accessible content has substantially transformed our Trusts and Estates practice. Our proactive records scanning project saved countless nonbillable hours and has dramatically improved service levels and overall client experience."*

**– Robert Baumgarten**
Chief Information Officer,
Shulman Rogers

# For Shulman Rogers, fast, reliable access to urgent documents reinforced its commitment to clients.

**Integrated software made reliable document access easy.**

Filing and retrieving documents is a simpler process with AccuRoute and iManage. Administrative staff utilize AccuRoute scan routing sheets barcoded with client and matter designations. The AccuRoute server interprets the barcode on each scan routing sheet and dutifully follows the embedded instructions.

Typically, users opt to convert scanned documents into searchable PDFs and place them directly into a matter centric folder within iManage. The search engine automatically indexes the searchable PDFs and makes them universally accessible via simple full-text searching across a repository of nearly 20 million documents.

With the AccuRoute-iManage process in place, the tedious process of responding to clients' requests has been replaced with a streamlined workflow and immediate access to files.

In all, over 7,500 separate original trust and estates documents were pulled and scanned directly into matter-centric folders in iManage. The firm completed the entire project in under nine months, ahead of schedule.

**The firm's revamp of Trusts and Estates is just the beginning.**

Today, attorneys at Shulman Rogers have instant access to all relevant client documents, regardless of how long ago they were created. Within minutes, attorneys can re-familiarize themselves with case details and provide meaningful information to the client, which has resulted in more client engagements and more time for attorneys to focus directly on revenue-generating matters.

Success in revitalizing the Trusts and Estates department has inspired the use of AccuRoute technology in other areas. The accounting team now scans invoices directly into its PerfectLaw accounting system to streamline invoicing processes. The firm also has future plans to take mailroom processes digital to provide attorneys access to time-sensitive case content from anywhere and any device.

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*"To properly serve our clients, we needed the trusts and estates files to be instantly accessible, not gathering dust in a cold archive. This was our challenge, and enlisting AccuRoute to take on our records scanning project was the solution."*

**– Robert Baumgarten**
Chief Information Officer, Shulman Rogers

## Results for Shulman Rogers

# 9 months
**to project completion**

Shulman Rogers scanned and digitized decades of records to improve access.

**Upland AccuRoute** helps organizations accelerate business processes by allowing users to easily capture, process, deliver, and fax content from any device using a single, unified platform. AccuRoute automates data capture and extraction using optical character recognition (OCR) to securely process through workflows to applications, people, or storage.

**upland AccuRoute**