

## Cleary Gottlieb Automates, Speeds Service with Captaris RightFax and IBM Lotus Notes

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### BACKGROUND

Cleary Gottlieb is a leading international law firm with offices in New York, Washington, Paris, Brussels, London, Frankfurt, Rome, Milan, Moscow, Hong Kong and Tokyo. The firm operates as one integrated worldwide partnership, with more than 2,000 professionals worldwide.

For over 50 years, the firm has been a leader in shaping the globalization of the legal profession. Among other recognition, Chambers & Partners named Cleary Gottlieb International Law Firm of the Year 2001 in its inaugural awards. The award is based on the Firm's:

- Commitment to the global practice of law,
- Appreciation of the different cultures within which it operates and
- Success in the jurisdictions it has targeted.

### THE CHALLENGE

Well managed communication is of utmost importance for law firms, especially one of Cleary Gottlieb's international stature, according to Chuck Burghard, Software Development Manager at the Firm's New York office.

Cleary manages a variety of message types. However, for its speed, ease and prevalence in court communication, one method stands out: "Litigation relies heavily on faxing," Burghard said.

Burghard and his team conducted an analysis on fax usage in 2001. While it showed an increased reliance on email and overall drop in fax use, they found faxing leveled at a significant rate.

"Our reliance on fax at Cleary has proven that finding," Burghard said. "During the past year, we've seen very consistent usage at 45,000 to 50,000 inbound fax pages per month for the New York office."

With substantial daily fax traffic, the central fax room in Cleary's New York office worked like a well-oiled machine. It did so by necessity to keep up with the inherent high demands of legal communication. Incoming faxes were received and distributed by members of the fax department who would often provide a heads-up to lawyers when an urgent fax arrived after-hours or while the lawyer was traveling. Since many faxes required delivery to several team members working on a case, the fax department often made multiple copies of faxes for distribution to all the contacts, including lawyers based internationally.

The process worked. But, Cleary lawyers noticed something in their dealings with other firms and clients: those with desktop faxing capabilities were receiving faxes faster because the documents were delivered directly to their email Inboxes. As a firm committed to superior service for its clients and useful solutions for its employees, Cleary researched desktop faxing. "It was an enhancement management knew would increase productivity," Burghard said.

Cleary Gottlieb set high expectations as requirements of a new fax system. The firm wanted a dependable solution that would leverage its existing messaging and collaboration software, IBM Lotus Notes. Some lawyers were concerned faxes may be delivered late or even lost. Thus, it also became top priority for any new solution to be fully reliable and flexible to meet the firm's needs.

## THE SOLUTION

"Fax is actually more reliable now," Burghard reported in reference to results from using Captaris RightFax, the proven market leader in enterprise fax and in e-document delivery solutions. According to Burghard, any concerns about late or lost faxes have been allayed. Since users already manage emails in IBM Lotus Notes, retrieving faxes—which appear alongside emails denoted by a fax icon—is easier and faster and than the separate, manual method.

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RightFax enterprise fax and e-document delivery solutions achieve significant cost reductions by integrating and automating the flow of a full range of fax, paper and electronic documents and data. "RightFax was an easy choice due to its penetration in the legal market," Burghard said.

Cleary Gottlieb worked with Greenwich Technology Partners (GTP), a leading network infrastructure consulting and engineering company in New York, to implement RightFax. With years of experience providing voice, data and fax solutions to the legal industry, GTP understands nuances related to operations and top concerns of attorneys.

Now, Cleary maintains close to 200 Direct Inward Dial (DID) numbers assigned to specific individuals so they may receive faxes directly. Since lawyers are often away from the desk or on the road, RightFax makes it easy to copy attorneys' secretaries who can watch for urgent requests. While the firm has not tracked specific statistics, Burghard said all RightFax users definitely receive and manage faxes with more efficiency, a result that proves indispensable as it enables the team to improve customer service.

While the DID direct transmissions offer valuable automation, Cleary appreciates the flexibility of RightFax to answer its specific needs. For instance, the Firm is currently using RightFax for inbound faxing and it prefers to receive the majority of faxes through a main fax number. These faxes are delivered to an IBM Lotus Notes Inbox managed by the NY office fax department. "Though there is still the manual intervention of someone watching the mailbox, it's much less than before," Burghard said. Since many faxes require copy and distribution to several team members working on the same case, labor is greatly reduced as faxes are received and forwarded electronically.

Burghard added, "Instead of retrieving a paper fax and making 10 copies to walk across the office, the fax staff can click and forward the fax, enter 10 email addresses, send it, and they're done."

Burghard estimates this process saves hours every day for the fax department. "The fax room viewed RightFax as a step forward and learned the new system quickly," Burghard said. "They like it because it makes faxing more efficient and reliable."

Additionally, the time saving return from RightFax frees the fax department to focus on other areas, such as imaging. For instance, the Firm is piloting a scan to PDF function that would allow users to obtain and fill out a single form for delivery to both email and fax recipients. The form, including assigned bar code, would be sent to the fax room, where—instead of being faxed manually—it would be scanned and linked to the database entry. The document would then be sent as a scanned PDF to email recipients and as fax-to-fax recipients. To accomplish the solution, RightFax integrates with Captiva scanning software.

In addition to productivity enhancements for the fax department, RightFax leads to timesavings for all professionals. "There's a big value to the increased productivity for the lawyers," Burghard stated.

After hours or while they are on the road, attorneys can view and manage faxes directly from IBM Lotus Notes. They no longer must depend on secretaries to read faxes over the phone or send the faxes to a home or hotel machine. This easy access has enabled lawyers to respond more quickly to urgent matters. "By checking in via email, lawyers obtain faxes they may not have seen until the next morning with paper fax," Burghard said.

Thanks to useful results, Burghard has received several positive comments about RightFax from lawyers and other staff members. Burghard partly credits the smooth transition to the "very good" integration of RightFax with IBM Lotus Notes. He reports that training on RightFax is easy since users are already familiar with the IBM Lotus interface. On the administration side, Burghard said, "We can easily go into the RightFax configuration and the integrated IBM Lotus Notes database to manage administrative tasks."

Burghard mentioned other benefits. "RightFax also makes it easier to ensure the virtual file room receives a copy of any faxes for later reference."

Also, the RightFax servers in the NY and DC offices are configured to support business continuity plans. Burghard explained, "If the T1 line in one office were to go down, we have built-in capacity to route those incoming faxes through the other office's equipment, transparently to the user. RightFax easily handles our redundancy and disaster recovery efforts."

## THE RESULTS

Along with timesavings, Cleary Gottlieb has enjoyed significant cost savings, according to Burghard. He reported the firm has reduced its number of fax machines and eliminated lease costs on other systems. "I would estimate we gained Return on Investment in RightFax in just 12 to 18 months," Burghard said. "And that's just cost savings on the hardware side—machines, paper, toner and so on." Burghard estimated adding in cost reduction from timesavings would speed ROI dramatically.

## FOR MORE INFORMATION

**Captaris** - Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, archive, deliver). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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