Going Paperless: How to Transition to a Paperless Law Office

Written by Willie Peacock

My law practice is almost entirely paperless. Now, it wasn't easy to get there. Ultimately, I can't control what the clients bring in, which is usually old paper copies that I have to scan into my system. And I'm not perfect: as a sole practitioner, I often find myself accruing a backlog of documents that need digitizing. But with paperless retainers, billing, and exchanging of drafts of pleadings and court orders via email, plus e-filing in some jurisdictions, I can easily say that I have an almost entirely paperless law office.

The good news: I get paid faster, my clients get their work done faster, and I can carry my laptop home with me to sneak in a little bit of extra work here and there. I can even take it to the other side of the world and keep my practice going. Of course, this ability to work remotely with a paperless practice is incredibly relevant today.

Below, I'll discuss the advantages of going paperless, the steps to switching to a paperless law office, and tools for paperless law firms.

Why should your law firm become paperless?

There are oh-so-many advantages to going paperless, especially for law firms. Below are just a few benefits I've experienced:

- Using a retainer with anelectronic signature saves you at least one step—you won't have to scan the document for record keeping. Plus, you can automatically send copies to all parties once they are signed.
- Digital processes (for instance, eDiscovery for law firms) are becoming commonplace in law firms.
- Assuming you have scanned all the documents into your case management software as text searchable PDFs, searching through a client's file for information will only take seconds.
- When you're in the room with opposing counsel, you can pull up a fact or document instantly.
- If you doflat-fee work (as I do today), even the little things—like when a client calls on a random Thursday with a question about their file—are made easier by being able to quickly type in a query into my computer, rather than shuffle through filing cabinets.

- The more time you save, the less you bill to the client. Sure, that means less revenue for you, but it also means the client is happier. Long term, thisclient-centered approach means better reviews, more referrals, and more business for your firm.
- When COVID-19 hit New York City, and our entire town shut down, I felt like the only person in the entire legal system who operated as business as usual. I was meeting with clients over the phone or online, all of my paperwork was digital, and I spent my spare time (courts are closed, so there's a limit to my ability to work regardless of my own prep) counseling other lawyers on how to get their home offices working in conjunction with their assistants' home offices.
- Lastly, I would be remiss not to mention the massive advantage of being able to work from anywhere, at any time.For me, this meant I went to the Philippines last year for a month and ran my practice without anyone knowing that I was on the other side of the world.

The long and the short of it is, running a paperless practice is simpler than you think. It's clearer than ever that the flexibility going paperless affords you is indispensable.

3 steps to going paperless

The first thing you will have to do, before thinking about software or scanners, is to buy in entirely. **You need to commit 100% to eliminating paper, as does the rest of your law firm**—Luddite lawyers, apprehensive assistants, *everyone.* A paperless system will require significant work up front, as well as some extra training time for everyone, but it does pay off in the long run.

Once you are ready, here are the steps you will have to take:

1. Switch to a paperless client intake system

Paperless systems begin before the client even signs a retainer. A brilliant way to handle all of the pre-legal stages of the case is to start with a customer relationship management (CRM) platform. There are a handful of lawyer-specific CRMs out there, with two in particular that integrate with Clio Manage: Clio's ownClio Grow andLawmatics, a third-party CRM with a heavier focus on automation that integrates with several different services.

Learn more about automating your client intake process.

2. Create a system for ensuring files stay paperless

Once a client has retained you, you will want instant access to their entire file with only a few clicks. You'll need a few tools to get this job done (more on specific recommendations to follow):

- **A cloud-based storage system**, such as Dropbox, OneDrive, or Clio Drive.
- **Software to convert your scans to text-searchable PDFs.**
- **A brilliant scanner** (or three).

Staying organized with dozens or hundreds of cases is tough with paper. At first, it'll feel even more difficult with electronic files. (I promise, it's easier once you get in the habit.)

3. Digitize your existing paper files

Finally, there is the issue of your backlog. Unless you are a brand-new law firm, you likely have dusty old files and a smattering of open cases.

Common sense should tell you to start with the files that you will actually need access to (current files). Then, digitize the files at a time where you can spare the paper copies (like the weekend). If you pay a service to digitize everything, you can get this done in a day or two. As an alternative, consider asking your staff for help.

Paperless procedures and protocols

As mentioned above, you need to have procedures in place for all your law office's paperless documents. These paperless procedures and protocols ensure that no files get lost and everything continues to be accessible.

Every firm is different. A 50-person firm, with individual legal assistants for every attorney, will operate differently than a one-man band shop. That said, here is a sample outline you can use to develop your own procedures:

1. Start digital wherever possible

Use electronic retainers and e-signatures, and save all legal work to the server in both Word and PDF.

2. Scan any paper as it comes in

To keep your law firm paperless, make it a policy to immediately scan any new paper documents as they come in and return the paper copies to the client. **Store the scanned files in the actual client folders on the server, not in a big folder called "SCANS".**

3. Make sure you're making text-searchable PDFs

Most modern scanning software will include an option to make the scanned PDF text searchable, but if not, use OCR software like Adobe Acrobat or ABBYY Fine Reader to convert it to a text searchable PDF.

4. Only keep documents that are required by local law to be in paper form

This might include deeds, wills, or other key documents with ink signatures. Even then, scan a copy into your system as a backup and for quick searches.

5. Keep your law firm's paperless files organized

Forfile naming, it's a matter of preference, but many smart people do: date, description, initials of they responsible party (Example: "2020-04-08 Letter to OC re: QDRO WCP").

Consider your directory structures as well. If you're using Clio's file storage, there is already a folder for each client. Litigators might create subfolders for pleadings, discovery, correspondence, etc., but do what works best for your practice.

6. Stop printing

This is easier said than done, especially for meetings. However, if you get into the habit of using a tablet or laptop to pull up your files from the server and to take your notes where the file lives (on your laptop or tablet, rather than paper), you'll save yourself a lot of time when it comes to searching your notes later.

7. Stop faxes

Don't worry, you can ease into it with tools that help you fax without a fax machine. I abhor my fax machine. I tell potential clients who ask to fax something over that they are the first person to ask to use it this year and it doesn't work. Most can figure out how to scan it, head to UPS or FedEx to have them scan it, or they mail me a copy.

8. Generally avoid creating more paper

Email files or share them digitally when possible. Sharing files digitally is way easier today than it was even five years ago. Today, everyone has a smartphone. If you can use a smartphone, you can take all of your notes digitally, allowing your legal practice to stay paperless.

Exchange files with counsel and clients digitally, whenever possible

Believe me, sharing files in a paperless way is *much* easier than printing something off, putting it in an envelope, adding stamps, dropping it off in the mailbox, waiting three days for it to be transferred by the postman less than a mile down the street, then waiting for somebody's assistant to pull it out of the mailbox, open the file, and hand it to the other side.

Default to e-filing

With all your court documents and forms online, e-filing is easier than ever, saving your law firm valuable time and money. And, with the right tools, this process runs even faster: Clio File enables legal professionals to file, serve, and deliver court documents directly from our industry-leading legal practice management system. That means firms will be able to:

- File and serve court forms without having to switch tools
- Stay on top of state court deadlines and requirements
- Get instant status updates on filings
- Pass through 100% of filing fees to clients

Clio File is launching state-by-state. Learn if Clio File is available in your state—if it's not there yet, you can sign up to be notified when it comes to you!

Technology and systems for going paperless

The biggest obstacle to starting a paperless law office, besides getting buy-in from your staff and building good habits, is attacking the backlog of files you want to digitize and ditching all the physical storage space.

Let's talk about software. You'll need software to turn scans into text-based PDFs, plus somewhere cloud-based to store all those files. There are great options, free and paid, to get this done.

Searchable PDF Software

The easiest and most user-friendly solution is to pay for commercial PDF software. Adobe Acrobat DC has a $15 per month subscription with the Pro PDF software and Adobe Sign, allowing you to batch-process all those scans sitting around in a folder. Pay a few assistants to come in on the weekend for a scanning binge, set Adobe loose on the files, and voilà—your backlog is complete, and your PDFs are now text searchable.

An alternative is Foxit Phantom PDF, which in my experience, is a little faster and more stable than Adobe's offerings—it also has batch OCR functionality.

Hardware: Get a brilliant scanner (or three)

We've mentioned scanning, which, as you probably guessed,will require a scanner.

Consider a powerful desktop scanner for day-to-day filings, as clients *will* mail or drop off paper files. Many lawyers swear by the Fujitsu ScanSnap series, though I've never seen fit to invest hundreds of dollars in a single-purpose device—even if they come with all the software and features you could ever need.

Somewhere to store your files

How aboutClio Manage? If you are a Clio user, you get all the storage you could ever need with Clio. You can also set up an integration with a cloud-storage provider, like OneDrive,Box,Dropbox, orGoogle Drive, first. Clio will create folders for all matters in the cloud drive. You can then drag files to from your computer, and they'll sync to both the cloud drive and Clio.

Not to mention Clio Drive allows you to create, access, and collaborate on your matter-related files from your desktop and securely sync them to Clio. You can keep your files backed up with secure, unlimited cloud storage.

Final notes on starting a paperless law office

Creating a paperless law office probably sounds like a massive, massive project. And it is. You and your entire staff will have to get used to storing things on a cloud drive instead of a paper folder in a filing cabinet. Instead of taking notes on a yellow pad, you should use a smartphone or tablet.

But here's the major upside: When disaster strikes, a paperless, cloud-based system allows you to pick up your work from anywhere.

That's not to minimize the task in front of you. It won't be easy to migrate to the cloud. And you don't have to do it all at once. Maybe start with active cases, or have your most tech-savvy attorney make the jump first and work out the kinks in your system. With a bit of determination and a lot of patience, you can do it.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.