4 Steps to Launching Legal Records Management at Your Firm

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Legal records management may not be the most glamorous part of practicing law, but it is essential for attorneys—and *can* be efficient.

Traditionally, paper record management systems make legal records management challenging for law firms. This is because paper record systems are typically inconvenient to manage, difficult to organize, and time-consuming to access and maintain.

Fortunately, today's cloud-based records management software unlocks secure and effective legal records management opportunities for lawyers. By leveraging digital record-keeping systems, firms can save physical storage space and precious billable hours. At the same time, law firms can provide a client-centered experience and help ensure sensitive client information and data remain secure.

Below, we'll walk you through how to introduce (or upgrade) an effective legal records management system at your law firm. From legal issues in records management to firm-specific factors, we'll outline steps to take before implementing a new system. We'll also explain how you can use technology to make legal records management easier, more efficient, and more effective.

1. Get clear on your needs

The first step to optimizing legal records management at your firm is to assess where your firm currently stands—and what your firm needs.

If your firm currently uses a manual paper records system to deal with legal records and documents, you should identify the pain points you'd like to overcome. Do you or your firm's staff spend a lot of time with manual data entry and file organization? Have you ever had trouble finding a certain file? Do you or your team require access to a document when you're away from the office? If yes, introducing a digital legal records management system could alleviate these issues.

Records management also depends on your firm's size and practice area. For example, smaller law firms tend to be best suited to digital document management that's built into practice management applications. With a seamless, integrated record keeping and

practice management system, firms can keep all their legal records and documents in one place—in the cloud.

Ease-of-use and efficiency are most likely priorities for your firm. Therefore, choosing a legal records management software that easily integrates with other applications—like Clio—will save you time, money, and effort when dealing with records and documents.

2. Prioritize organization

Every business works with records and documents, but because law firms deal with legal records and sensitive client data, firms need to prioritize records as the informational assets that they are. That's why it's essential for law firms to prioritize organization for their legal documents.

In addition to being housed within a sound legal filing system, legal documents must be accessible and easy to find. When access is a priority, digital management systems are superior.

As an example, imagine an instance where an attorney needs to access a business document from a client's file when working on a case. With a traditional document management system, the attorney would need to go to the office and search through paper files. Should the document be in the wrong spot, it may be difficult or impossible to find. Alternatively, with an application like Clio, if a lawyer needs to access that document, they can search for the document remotely. Users can do this by entering a keyword—pulling up the document in seconds.

Moreover, digital records and documents reduce the need for lawyers to make copies and multiple versions of the same document. Less duplicate documents save time while supporting better organization. Additionally, features like the ability to file documents straight from the source make it easy to keep documents and records organized from the start. For example, Clio's email add-ins let you save emails and attachments directly to specific matters.

Another component of organization is standardization. Ensuring everyone on your team uses the correct legal letterhead, accounting processes (and everything in between), goes a long way.

3. Understand applicable privacy and data protection laws

Clients trust lawyers with their legal records. It's also a lawyer's duty to protect the data and information that those records and documents contain. When it comes to legal records management, this means having a strategy for how your firm handles client data and documents—from document retention policies to records management and policies for destruction of records, when applicable.

As outlined in more detail in our guide to law firm data security, it's your professional duty as an attorney to protect client data and stay compliant with any applicable privacy and data protection laws—which means it's also important that you understand and abide by any privacy and data protection laws that impact legal records management.

Law and rules in this area can vary from state to state, so be sure to check out your state's laws. Your state's bar association may be a good resource to guide your research. For example, Washington State Bar Association offers guidance for document retention and records, including rules and professional obligations for how long certain types of records must be retained.

You can also leverage technology to support your legal and ethical obligations pertaining to legal records management. For example, storing client documents in the cloud via legal software that's designed with security measures can help you meet your obligation to protect client information from data breaches as part of your legal records management system. (such as Clio's security features, which include in-transit and at-rest encryption and automatic backups)

4. Leverage records management software

As an attorney, time is your most valuable resource. Yet, lawyers often lose a significant portion of their workdays on non-billable and administrative tasks. Specifically, the most recent *Legal Trends Report* found that lawyers spend an average of just 2.9 hours of an 8-hour workday on billable work. Tasks like manually searching for, storing, and managing legal records can account for some of that less efficient time.

When it comes to legal records management, software can make daily workflows easier and improve your efficiency—freeing up your time and energy to focus on clients, billable work, and growing your law firm. Here are some of the key benefits of digital records management software:

Find the file you're looking for fast

Even with an excellent paper filing system, sifting through paper records to find what you need is time-consuming and inefficient. Legal records management software like Clio lets you digitally search by keywords (using the document's title, metadata, or text) to find the file in seconds.

Use electronic signatures

Dealing with signatures is another common—and time-consuming—task that comes with paper-based document and record management. Using software that enables electronic signatures cuts down on the hassle and time while offering clients a more convenient experience.

For example, Clio's e-signature capability lets you review, prepare, and send out documents for signature via email. Then, you can automatically and securely save the signed documents in Clio.

Access your legal documents from anywhere

Another time-saving advantage of using software to store and organize your legal records and documents is that you can access them—securely—from anywhere.

Take Clio as an example. Whenever you need to view, redline or annotate a legal document, you can use Clio to access your documents. This allows you to work from wherever you are—making remote work more efficient and effective.

Store an unlimited amount of legal documents

Physically storing legal documents and records properly can be expensive and takes up a lot of office space. With cloud-based document management software like Clio, you can store an unlimited amount of legal documents. You can store data from documents to images, audio and video files in a secure online space with Clio. You can also automatically back up your legal files.

Clio's legal records management software can improve your bottom line

The way that you handle legal records management can also impact your firm's profitability. As previously noted, non-billable tasks drain your law firm's time and productivity. When you leverage software to spend less time on legal records management jobs (like searching through paper files for records), you have more time for billable work.

Additionally, storing paperwork in the cloud helps cut down on unnecessary costs associated with finding physical storage for documents.

Clio's legal document management is just one feature of Clio Manage's practice management software. In addition, Clio's software integrates with many other applications that assist with legal documents and record management, such as:

- **Clio Draft's** legal document automation and e-signature software, which allows you to populate documents with client information from Clio Manage.
- **Record Grabber**'s record retrieval features, which integrate with Clio to eliminate double data entry when requesting and retrieving medical records.
- **YoCierge**'s cloud-based record retrieval functionality, which integrates with Clio for easier and more organized document ordering and direct record delivery.

Legal records management software cuts down on training time

When you're dealing with physical files and documents, implementing a brand-new records management system can be a challenge. A new records management solution may require you to train staff on the new policies, procedures, and guidelines.

However, legal records management software greatly reduces the hassle that can come with training staff on a new system.

You can lessen the need to learn a new system solely for document and record management. Accomplish this by choosing an all-encompassing practice management software with built-in document management features.

Conclusion

Legal records management is essential for protecting client information and staying compliant with privacy and data protection laws. Also, legal records management software can help lawyers create more effective and efficient systems.

While legal records management has traditionally been a time-consuming, manual task, today's digital record keeping and document management software allows lawyers to securely store, organize, and manage client documents and records. At the same time, lawyers can save time and space. Additionally, because legal document management software allows lawyers to securely store legal documents in the cloud, lawyers can also access legal documents more easily when needed. If your law firm struggles to manually manage legal records and documents, consider implementing legal records management software like Clio. You could save your firm time while making it easier to keep client data secure. You can learn more about Clio's legal document management software or try a free trial of Clio.

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.