

TAB CUSTOMER PROFILE

Legal

BUSINESS CHALLENGE

Any way you look at it, Azulay, Horn & Seiden, LLC, (“AHS”) of Chicago, Illinois, is a law firm on the rise. The firm has built a highly successful legal practice, recently merged with a second law firm, operates one thriving practice in the city and a second in the suburbs of Palos Hills, has recently added offices in Tampa, Florida, and New York City and intends to expand worldwide! While all that sounds great, there were four critical and fundamentally related challenges that Ira Azulay called upon TAB to help him solve.

First, there were at least five decentralized filing systems at work within the firm, resulting largely, but not exclusively, from the earlier merger of a few smaller law practices to form the current law firm. Creating a cohesive atmosphere was AHS’s goal, but it proved difficult within the existing environment, which offered no standardized system for managing the firm’s massive volumes of client files. Standardizing files and developing a centralized file-tracking system was essential to AHS’s vision of a unified firm working together.

Next, there was the challenge of improving the efficiencies of file retrieval and minimizing the delays that attorneys faced in receiving their requested items – ultimately allowing them to better service their clients.

Third, there was the need to implement a way to quickly differentiate closed files from open files, and establish uniform records management practices via color-coding and the use of one primary information identification scheme.

Finally, the AHS vision included taking full advantage of growth opportunities. AHS wanted a streamlined records management system, capable of improving current operations with the capacity and capability to seamlessly support future growth and expansion.

Oh, and one more thing: the firm was about to relocate its operations to a new office! They would shut down at noon on a Friday, move to a new facility still partially under construction, and reopen fully operational the following Monday morning. Total conversion to a brand new file-tracking system – meeting all the challenges listed above - had to be accomplished within that time frame!

Weekend Move Offers Window of Opportunity for Full-scale File Conversion

Profile Summary

- Improved file retrieval rates
- Increased productivity
- Improved customer service
- Reduction in overhead costs



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TAB SOLUTION

The ability to execute in a short time frame was the key, as relocation offered a prime opportunity. The entire firm would be technically down for only a weekend — a tiny window of opportunity to implement a massive 100% file conversion plan. But it was the only way Ira Azulay was able to achieve buy-in from his colleagues, to the overall concept of full-scale shift to a centralized and standardized file tracking system.

Adhering to the tight timeframe given to complete this project was an ongoing concern throughout the planning and execution phases of the AHS project. TAB was the only company who could provide the total solution — complete system design and implementation, fully supported by a commitment to complete the project on time and on budget. Other competitors interviewed offered only partial solutions and none were able to commit to the tight schedule. For TAB, this project was challenging, but not dissimilar to numerous projects done before.

"There wasn't anyone else who could step forward and physically meet the requirements of this project, with the given timeline," said Ira Azulay when asked why TAB was chosen as their single-source provider. "And, our need to transform legal files into a valuable, rapidly-retrievable resources was paramount."

The task of converting their existing legal records to new, color-coded files began earlier in the week — just prior to the move.

"What used to take us days if not weeks to locate specific files, in most cases, now takes minutes."

As the weekend arrived, the task of completing the last of the conversion, relocating the entire system to the new facility, sorting the entire system from alpha and straight numeric to Terminal Digit ("TD"), laying-out the TD system in the new TAB high density mobile system, uploading the entire system and performing a final audit for accuracy kept the TAB Professional Services Team busy! The law firm's staff was in disbelief that this entire relocation process could be successfully managed and completed within 2.5 days!

RESULT

As planned, the firm closed at noon on Friday and reopened fully operational on Monday morning. Said Ira Azulay "here was disbelief and amazement; and not a single complaint." In fact, the firm's Records Manager, Donicse Redmond, is perhaps the most pleased of all. Her staff is enjoying a far superior working environment and shares a genuine pride in their fully converted filing system. Efficiency has vastly improved. Ms. Redmond summed it up by saying: "What used to take us days if not weeks to locate specific files, in most cases, now takes minutes."

AHS attorneys who operate under the pressures of impending deadlines and heavy caseload gain valuable time that they can leverage to their advantage. TAB helped insure that the law offices of Azulay, Horn & Seiden, LLC. can continue their impressive growth, while improving day-to-day caseload management. That's what we call a successful conversion!



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AHS LAW OFFICES OF
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