

## Case Study: Lane Powell, PC



# LANE POWELL

ATTORNEYS & COUNSELORS

With 180 attorneys in offices located in Seattle, Washington; Portland, Oregon; Olympia, Washington; Tacoma, Washington; Anchorage, Alaska; and London, England; Lane Powell PC is thoroughly versed in the industries of the Pacific Northwest as well as the legal issues that face their clients on a regional, national, and international level. A multi-specialty law firm, Lane Powell has helped emerging and established businesses navigate the Pacific Northwest and beyond for more than 135 years. Respected clients from individuals to small businesses to Fortune 500 companies turn to them for trusted legal counsel.

### The Challenge

The challenge facing Lane Powell was to find a cost-effective modern imaging solution which would easily integrate with their existing financial systems.

### The Solution

ExpertImage provided the fully-featured imaging solution which seamlessly integrated with the existing Elite Financial Management System.

### The Results

Within 2 years of purchasing and implementing ExpertImage, the firm was able to realize its initial return on investment based on actual staff time saved on manual scanning and imaging procedures; cost and time savings associated with the reduction of physical file storage and retrieval; and the digitalization of the disbursement backup process, eliminating the cost of retrieval, copying, re-filing and postage.

#### The Story

As the Controller for Lane Powell, John Street had spent the previous 14 years overseeing the firm's accounting function including payroll, billing, trust accounting and accounts payable.

During that time, he had witnessed the automation of many accounting processes and advancements of financial management systems and technologies. However, imaging of financial transaction documents remained a hugely time-consuming task.

The firm had been looking to enhance its existing **Elite Financial Management** system with an upgraded imaging solution for the Accounts Payable (AP) invoices. The existing system, although functioning at a basic level, lacked advanced features and functionality.

Street looked to automation to speed up the imaging process and also provide much broader access to scanned invoices.

Street and his team analyzed the time and financial resources it took to manually scan invoices, and how much effort was expended to retrieve the desired scanned images, not only for single invoices, but for larger groupings based on various search criteria like GL codes, dates, and specific clients or matters.

Armed with this information, the team made an extremely compelling business case for investing in a more advanced and dedicated imaging solution.

#### The Decision

Street quickly zeroed in on Applied Technology Group's ExpertImage application. Beyond appreciating the simplicity of the application, Lane Powell's accounting group was struck by how ExpertImage could streamline the firm's image management processes, expedite AP invoice searches and retrievals, manage overall image access, and also improve image retention policies. On top of that, and a critical factor not only for Street, but also firm IT, was the ease and seamlessness with which ExpertImage integrated with the existing

Elite Financial Management System and the firm's workflow applications.

#### The Implementation

When Lane Powell made the decision to purchase ExpertImage back in 2007, the first big undertaking was to convert all existing AP invoice images into the new system. This turned out to be very efficient and easy, thanks to an extraction program written by ATG, which was designed to extract all images and link them to their respective vouchers in Elite.

Within a few short weeks, the data conversion was complete, all internal training on how to access and customize the system was finished, and the firm's accounting group was up and running with full integration with Elite.

#### The Extra Benefits

**Budgeting Intelligence:** According to Street, there are distinct business advantages to having AP invoices scanned and searchable including access to all AP details based on specific GL codes or other parameters. "ExpertImage's AP module makes it so much easier to manage firm spending, saves valuable accounting time on research, and truly facilitates budgeting and cost analysis."

**Workflow:** ExpertImage gives Accounting much needed flexibility when it comes to answering invoice questions on-the-fly and responding to immediate attorney requests. With ExpertImage, the accounting staff can access all data from their desktop and are spending a lot less time in the file room searching for invoices. This also gives the attorneys faster answers when interacting with their clients on billing matters. Having instant access to scanned invoices goes a long way toward improving client service and ultimately, getting paid faster.

**Added Features:** Based on Lane Powell's overwhelmingly positive experience with ExpertImage's AP Invoicing solution, the firm proceeded to successfully implement modules for handling other image types including cash receipts and trusts.

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**ExpertImage**

253.351.8600 | sales@expertimage.com | www.expertimage.com

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