Casner & Edwards consolidation to Copitrak improves client service.

Challenge
– Multiple stations for scanning and copying: Users were logging in to one station to copy and another to scan
– Multiple vendors to call for support: The IT department would have to call a different support line for each issue

Solution
– Nuance Copitrak: Consolidated two systems into one Copitrak solution that provided cost recovery, ease of use, scan routing into document management systems, and peace of mind

Results
– Combined two systems into one
– Simpler PDF conversion process
– Decreased user frustration level
– Reduced IT time spent to support system
– More accurate billing

Summary
Boston-based law firm Casner & Edwards prides itself on keeping abreast of changes in business and the law. For over 40 years, staying current has gone hand-in-hand with providing superior client service to individuals, businesses, and institutions. The firm attracts leading attorneys who provide sound counsel and personalized attention to clients. Casner & Edwards represents clients in a variety of matters ranging from litigation to trusts and estates, in business and personal matters. The firm consists of 40 attorneys and 26 support personnel.
“Copitrak is all about the ease of use. With the quick press of a button, you can scan documents into iManage, or if you want to send them as an email to multiple recipients in the firm, it’s easy to look up email addresses on the keyboard. If you can save the end user five seconds, that’s important.”

Paul Masuret, Executive Director
Casner & Edwards, LLP

The firm had reached a crossroads with its former copying and scanning solution. It required two terminals, had little to no workflow features, was problematic integrating with the billing system, and required extra steps to send documents to the firm’s document management system. This took valuable time away from client matters, frustrated users, and made it difficult to engage in cost recovery activities. For example, a user would need to log in at the copier for copies but move to a different station to scan and route documents.

As a result, Casner & Edwards, which had reached the end of the line with its existing contract, began evaluating solutions that would be easy to use and integrate with billing and document management systems.

Finding a single system that played well with other systems
The current system was hindering productivity, cost recovery, and ultimately client service. Casner & Edwards had four factors at play when evaluating a new solution:

- **Consolidating the stations.** In addition to lost productivity, the firm also wanted to reduce the footprint in the copy and scan areas.
- **Ease of use.** Logging in to two stations frustrated users, especially new users or temporary employees.
- **Workflow management.** Casner & Edwards needed the ability to route documents to email or document management systems from the scanner.
- **Cost recovery.** The firm required accurate numbers to properly bill our clients, and a new system would need to integrate with the firm’s billing software.

The logical path to Copitrak
Casner & Edwards embarked on its mission to find a new solution, evaluating several packages. Ultimately, the firm chose Nuance Copitrak because it met the firm’s needs and was bundled economically, as cost was an additional factor. Nuance also took the time to put together a bundle that made sense for the firm and listened to what Casner & Edwards needed. The firm was already familiar with Nuance products and was pleased with its existing installs of Power PDF and Dragon NaturallySpeaking. Copitrak Cost Recover, Copitrak OCR, and Copitrak Scan to iManage would provide Casner & Edwards with the streamlined workflows and ease of use they needed.

“You can tell that Nuance pays attention to what the customer needs,” said Paul Masuret, Executive Director at Casner & Edwards. “They didn’t try to sell me anything I didn’t need; my representative knew I only wanted certain features, and he designed the bundle for it.”

Ease of implementation, ease of use
Copitrak implementation went smoothly. All users were trained before the system went live, and training went quickly because the system is very straightforward. Since implementation, Masuret hasn’t heard any feedback from users—which is a good thing. “I hear about it when there’s a problem,” he said.

More time for client service
With the streamlined workflow and ease of use gained by consolidating two stations into one, Casner & Edwards attorneys and staff have more time to spend providing the personalized service prided by the firm. There haven’t been any issues whatsoever with the Copitrak software, and the confidence and trust level is much higher with the new solution.

“It’s a rock solid system,” Masuret says.

To learn more about Copitrak products, please call 1-800-327-0183 or visit nuance.com.

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About Nuance Communications, Inc.

Nuance Communications, Inc. is a leading provider of voice and language solutions for businesses and consumers around the world. Its technologies, applications and services make the user experience more compelling by transforming the way people interact with devices and systems. Every day, millions of users and thousands of businesses experience Nuance’s proven applications. For more information, please visit: www.nuance.com.

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