

Case Study

**WILLIAM
ROBERTS
LAWYERS®**

Williams Roberts Lawyers Enhances Visibility and Control of Costs with Kofax.

Disbursement costs are a significant component of legal billings, and tracking them accurately is crucial for firms like Williams Roberts Lawyers to maintain healthy margins. To deliver fine-grained visibility into the true cost of serving its clients, the firm uses Fuji Xerox multifunction printers with a cost recovery solution based on Kofax Equitrac.

Delivers
granular insights into costs

Boosts
accuracy of
billing calculations

Offers
full transparency to clients

Work Like Tomorrow.™

KOFAX

Case Study



About William Roberts Lawyers

www.williamroberts.com.au

William Roberts Lawyers is a mid-sized legal firm headquartered in Sydney, Australia. With additional offices in Melbourne, Brisbane and Singapore, William Roberts Lawyers provides legal services in dispute resolution, litigation, and personal, commercial and property transactions.

Products in Use

Kofax Equitrac

Kofax eCopy

Focus

Cost recovery

Automatic client disbursement cost allocation



About Fuji Xerox Australia

www.fujixerox.com.au

Fuji Xerox Australia offers a wide range of business solutions including the provision of office multifunction devices and copiers. These help customers reduce printing costs and streamline their processes.

Challenge

As part of William Roberts Lawyers' commitment to transparency and cost certainty, it provides large institutional clients with fixed fee or event-based billing that incorporates client disbursement costs such as photocopying, printing, faxing and scanning. In the past, William Roberts Lawyers typically billed its smaller clients on an hourly rate, and absorbed any out-of-pocket expenses itself.

Tony Cavar, Finance Manager at William Roberts Lawyers, explains, "Initially, our approach to recouping disbursement costs for clients worked well, but as the firm grew we realized that our costs were growing rapidly, too.

"Because we had no reliable way to calculate how much we were spending on disbursement, we had to

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Tony Cavar, Finance Manager, William Roberts Lawyers

rely on conservative cost estimates. As a result, we were confident that we were undercharging our clients for the disbursement work we were doing."

The lack of cost recovery capabilities also created other challenges for William Roberts Lawyers. Without the ability to record and report on the types of activities performed on each client's behalf, it was difficult to identify valuable opportunities for operational cost-savings.

"We knew there was a degree of wastage in the organization—printing some documents in color when they could be printed in black and white, for example," continues Tony Cavar. "Without a way to drill down into our spend data, we were unable to see the extent of these costs and decide whether we needed to change our policies to reduce them."

With the firm's multi-function printer (MFP) contract due for renewal, William Roberts Lawyers decided to investigate its MFP options and look for a cost recovery solution at the same time.

"We targeted a solution that would allow us to calculate and recoup client costs—enabling us to maintain control and transparency in our approach to billing," Tony Cavar comments. "The aim was to continue to offer fixed billing for institutional clients, while enhancing our ability to calculate fair and accurate disbursement fees for smaller clients."

Solution

To gain deliver the new capabilities, William Roberts Lawyers selected an MFP platform from Fuji Xerox and a cost recovery solution based on Kofax Equitrac.

Kofax Equitrac allows firms, regardless of size, to effectively track all essential client service activities including printing, scanning, faxing and copying.

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The solution also tracks landline phone, postage, courier and research charges. Easy to deploy, Kofax Equitrac works within a firm's existing print and IT infrastructure, and seamlessly with popular practice management systems. Powerful and smart, Kofax Equitrac also provides detailed, meaningful reports so that firms can make informed decisions about costs, resources and productivity.

"After five weeks of testing both the Fuji Xerox equipment and the Kofax Equitrac cost recovery solution, we knew we'd found the solution we needed," recalls Tony Cavar. "We were confident that the investment we were about to make was more than viable."

Working together with teams from Fuji Xerox and Kofax, William Roberts Lawyers deployed the new MFP and cost recovery solutions.

"Kofax Equitrac is very user-friendly and intuitive, so we required very little training to get started," adds Tony Cavar.

Results

Today, William Roberts Lawyers can easily and accurately capture, record and recoup expenses on client matters.

"Thanks to the accuracy that Kofax Equitrac provides us, we can now offer clients realistic fixed fees and bill with peace of mind," says Tony Cavar. "The Kofax solution is rock solid and 100 percent reliable. Crucially, we can now ensure that costs don't exceed our revenue."

With detailed reports from Kofax Equitrac, William Roberts Lawyers has the visibility it needs to identify where improvements can be made to reduce its environmental footprint and minimize costs for the firm and its clients.

The security capabilities of Kofax Equitrac have been a welcome benefit for William Roberts Lawyers. Tony Cavar comments: "Although information security was not one of our main selection criteria for the new solution, it is certainly advantageous. Because our employees must punch in an access code to activate

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Tony Cavar, Finance Manager, William Roberts Lawyers

an MFP, our documents are well-protected and the potential for paper and toner wastage is minimized."

Since its initial deployment, William Roberts Lawyers has extended its Kofax solution by integrating the platform with Kofax eCopy—a secure document capture solution.

"We have used Kofax eCopy Scan to automate our billing process, which has saved us time and money," Tony Cavar explains. "We are now looking into integrating Kofax Equitrac with our Lexis Affinity practice management solution to further streamline our tracking of client services."

Tony Cavar concludes: "I can't praise the Kofax solution enough. Kofax Equitrac has delivered far more than we expected, and the proactive nature and professional support we've received from Kofax is commendable."

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