

Case Study



Cottyn Slashes Time to Organize Documents with Kofax Autostore

To maximize efficiency in client service, law firms need to automate as many manual processes as feasible. Brussels-based firm Cottyn turned to Kofax to automate the scanning and entry of client documents into its CRM system.

50%
Faster Document
Scanning Process

Ensures
Relevant Client Documents Are
Captured and Accessible

Enables
Attorneys and Staff Members to
Work More Efficiently

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Case Study



Meet Cottyn

Cottyn is an independent law firm with many years of expertise and extensive know-how in various parts of the law. The firm provides a complete business service to companies, governments, financial institutions and private individuals, across language and national borders.

Products in Use

Kofax Output Manager
Kofax AutoStore

Focus

Automation, Document Management

Challenge

In the legal field, time is money. If your attorneys and support staff spend too much time scanning documents, then routing them into document management or customer relationship management (CRM) systems, that's time you can't get back to solve client problems.

Brussels-based law firm Cottyn understands the importance of automating processes like document scanning and storage. For several years, the firm relied on a system built by its former multi-function printer (MFP) provider to scan documents into its systems. However, the MFP provider could not integrate its own software with Cottyn's CRM, requiring support staff to manually link documents into the CRM system. Cottyn turned to its MFP provider to find a solution that could integrate with its CRM system and improve productivity.

"Kofax Autostore takes much less time to scan documents and enables us to work more efficiently."

Thierry Hermans, Partner, Cottyn

Solution

When Cottyn explained its needs, the MFP provider immediately suggested using Kofax Autostore. Unknown to the company, its prior MFP provider had licensed a version of Kofax Autostore to use with its MFPs. However, the MFP provider's expertise ended at providing its white label version of Kofax Autostore; it could not integrate systems like the one Cottyn uses to manage documents.

The firm considered two options: moving to new MFPs and adopting Autostore directly, or trying to find a software developer who could create an integration between the MFPs and the CRM system from scratch. Since Kofax offered a viable alternative to developing new software, Cottyn chose to upgrade its MFPs and become a direct customer of Kofax, adopting Kofax Autostore and Kofax Output Manager to manage its scanning and printing, respectively. The firm went live with Kofax products in February 2018, with minimal impact to operations.

Transitioning to Kofax Autostore proved to be smooth for Cottyn; because the interface on the firm's former MFPs had been so similar, using Kofax Autostore felt familiar to the users. The firm immediately began using the product to scan documents and route them to specific files. Each scan is then linked to a task in the CRM system, which then generates an email to the attorneys and staff responsible for the file.

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For example, a support staff member will scan in a document provided by the client. Kofax Autostore automatically routes the document to the correct file in the CRM system, and the attorneys working on the file receive an email that the document is available and ready to be reviewed or acted upon. This not only populates the CRM system with documents and routes them appropriately but also creates accountability for the documents.

“We found it easy to start using Kofax products,” said Thierry Hermans, Partner at Cottyn. “Everything goes where it’s supposed to go, and we can focus on more client work.”

Results

Prior to the deployment of Kofax Autostore, the scanning process was a menial, time-consuming task. The Kofax solution has significantly reduced the time required; Hermans estimates that it now takes about half as long as before to scan and manually route documents to the appropriate file in the CRM system.

One unexpected benefit arises from how easy it is to use Kofax Autostore and how quickly it scans and routes documents. As a result, staff members are much more likely to scan documents. Not only does this ensure all relevant client documents are accessible in the CRM system, but it also means that attorneys and staff members work more efficiently on files because there is much less time spent searching for paper documents.

For organizations that want to simplify scanning and routing documents, Hermans said, “I would advise them to do the same: adopt Kofax Autostore and Kofax Output Manager.”

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