

# It's 2025: What Did We Do to Successfully Shift Law Firm Operations?

By Rob Mattern

When the pandemic of 2020 hit, our firm, like most others, vacated our flagship mid-town Manhattan office along with our other domestic locations and, began the process of working and collaborating from home. Initially it was chaotic, but we learned to Zoom, work remotely, and the billable hours which decreased initially, came back and we ended up close to budget. Payments from clients were slow through 2020 but rebounded in 2021.

About 80% of the attorneys and staff at our New York location elected not to return to the office on a full-time basis, and about 50% of the attorneys and staff at our other locations decided the same.

When several vaccines were developed and things reverted somewhat back to back to normal around 2021, we found ourselves as a firm with too much space, too much equipment (and not the right kind), an underutilized administrative staff, and a fragmented, patchwork approach to the "New Normal."

As a firm, we decided that our operational plan moving forward was to develop an operational strategy that could withstand any kind of disruption, including new pandemics. The operational strategy we developed, therefore, was based on the following priorities:

1. Safety of employees and clients
2. Maintain excellence in the legal services we offer
3. Flexibility/scalability over services, costs and staffing even if there was a premium that had to be paid

## Real Estate

We were fortunate that our lease in Manhattan was expiring in 2025 and provided a strong negotiation position. Since 50%-80% of our attorneys now maintain home offices, we had an opportunity to redo our space to reflect the new workflow.

We downsized our office space by 60% and set-up a hoteling concept for the 20%-40% of our attorneys who will be in the office at any one time. We also downsized our conference floor since, quite frankly, people are still reluctant to meet in person even with the vaccine. This had a ripple effect on reducing the need for hospitality staff as well and so we also outsourced the set-up for coffee/meals to a service provider located in our building.

We designed our office space to provide separate offices for each attorney, secretary and paralegal; widened all hallways to allow people to socially distance; set-up one-way corridors to reduce congestion; and reduced gathering spaces throughout the firm by creating more coffee/output stations.

In our other offices where we had a longer lease commitment, we created a similar plan to decrease space either through subletting or at lease renewal.

## Servicing the Home Users

Half or more of our workflow is now home-based and this, we realized, would



require help desk assistance, and output support. We elected to standardize all our staff with an "office in a box." This included a color multi-functional printer (MFP) with scan, print, copy functions including a cloud-based cost recovery tool. As part of this rollout, we also negotiated a national break/fix contract for service. We piggybacked on to this contract all consumables for output (toner/paper) so everyone in their home-based offices would be standardized which made help-desk assistance much more streamlined.

The savings alone from standardizing paper and toner purchases more than made-up for the cost of the MFP purchases. We already had migrated all our applications to the cloud, so we were all set in this area. In conjunction with this redeployment of equipment to the home offices, we also dramatically reduced the output devices (MFDs and printers) in all our offices.

## Administrative Services

To address the administrative support needs throughout the firm, we developed an in-house administrative

SWAT team made up of the best talent available. They were not centralized physically but were either located in their homes or in the firm's office that they wished to be located in. We had a single point of contact that "quarterbacked" the distribution of work assisted by a job submission tool that monitored workload and productivity.

This team was responsible for handling the followings tasks firmwide for all associates, and certain partners:

- Handling office tasks, such as generating reports and presentations, setting up for meetings (including video conferencing), and reordering supplies;
- Making travel arrangements and reservations;
- Preparing travel and expense reports;
- Attorney time entry;
- Screening phone calls and routing callers to the appropriate party; and
- Transcribing minutes from meetings.

Also, after an external unbiased assessment of our document processing department, we decided to outsource this entire function to a service provider that specialized in this area. After a Request for Proposal (RFP) process, we chose a provider that would service the firm 24/7 domestically.

## Records

Our on-site records function, along with our off-site situation, has always been a mess. We brought in outside assistance to perform an unbiased assessment (the same company that reviewed our document processing). This company also developed our Information Governance policy with associated

retention schedules and mapped out a plan to implement the policy.

The implementation plan highlighted four keys areas of improvement:

- In-house paper-based and electronic records.
- Our off-site records storage contracts.
- The upfront digital pathway/workflow.
- The right structure and management of our in-house records.

With a "remote" workforce it was critical we move to the "electronic records" being the official record of the firm and get our paper records in shape.

We decided to outsource our records to the same company that we outsourced our document processing to. After that RFP, we did a firmwide RFP on off-site records which brought excellent results and assisted us in implementing a plan to be out of the off-site records storage in eight years.

## Back Office Functions

After assessing our back office function (copy, mail, etc.), we decided we did not really need it anymore with a decentralized workforce. The elimination of this "need" which was more "perceived" than "real" enabled us to think outside the box on how some key services were performed. We decided to implement the following:

1. We established a national contract with an organization to scan all incoming mail and distribute it to the end-users electronically.
2. We established a national contract with another provider to provide overflow copy and finishing services. Users were able to use this service from their homes or the office. This

had a side benefit of migrating a lot of our work from a soft-cost recovery to a hard-cost recovery which greatly increased our recovery rate.

3. Lastly, for the miscellaneous services, we established a concierge to assist our staff.

## A Look Forward

In examining the goals we outlined for ourselves to protect the safety of employees and clients, maintain excellence in the delivery of legal services, and to shift operations to optimize flexibility and scalability, I am happy to say we exceeded each one. We have the ultimate flexibility in every service area and are delivering services much more cost-effectively. Our firm is growing, we are now more profitable, and our overall morale is at the highest level since I became managing partner.

With our de-centralized approach and our work from anywhere mentality, we are attracting the best talent we ever had; for example, our Chief Marketing Officer is located in Wilkes-Barre, PA 100 miles from our nearest office. As Winston Churchill said: "Never let a good crisis go to waste," and that is exactly what we did in re-engineering the way our firm supported our attorneys in delivering the highest quality work.



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