

Mattern Helps Woods Rogers Find a Way Out of Prohibitive Off-site Storage Contract at No Cost to the Firm

Opportunity: With more than 80 attorneys, Woods Rogers PLC is one of the largest law firms in Virginia. In 2020, the firm's off-site records storage contract with their national provider was coming up for renewal. After a complimentary benchmark by Mattern, Woods Rogers' leadership knew their pricing and terms could be dramatically improved. This was especially critical since the firm was seeking to implement a retention schedule for their off-site storage holdings, but the cost of destruction was prohibitive, and the agreement held little protection for the firm's interest.

The firm's leadership was stymied to find a solution to remedy the agreement and discussed the situation with Mattern. After reviewing the firm's goals, Mattern recommended Woods Rogers conduct a competitive Request for Proposal (RFP) process.

Process: After analyzing the current situation and retention plan, interviewing the key stakeholders, and analyzing their service/performance levels, Mattern returned their recommendations and plan for the open RFP which included:

- Perform an annual audit of out carded storage boxes and destroy or permanently withdraw any "out" status boxes that have been out for an extended term (e.g., longer than 3 months).
- Do not scan off-site records or on-site files which are closed. Let them remain in storage and destroy when retention schedule dictates.
- Engage providers about solutions to assist Firm to consolidate partially filled boxes and understand what exists overall with current inventory, to assist with destruction goals.
- Compare costs with provider supplied transportation and handling of boxes with independently sourced transportation and handling.

Mattern then created the RFP, reviewed potential service providers, and assisted in selecting which providers would receive the RFP.

Results: After conducting the RFP process utilizing the Mattern Method®, Woods Rogers selected a new service provider to manage their off-site inventory.

Mattern was able to secure a new contract for Woods Rogers with the majority of Mattern's recommendations implemented – which resulted in a savings of 43%, all permanent withdrawal fees covered by the new service provider, all Mattern's fees reimbursed by the new service provider, and going forward, permanent withdrawal fees were reduced 56% so future destruction would be cost-effective.

The net cost to Woods Rogers was \$0.00.

Tanya Graybeal, Support Services Supervisor at the firm, commented:

"I was skeptical about using a consultant, but the Mattern team thought of issues I would not have considered on my own and did an excellent job negotiating our contract, saving us hundreds of thousands of dollars."

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Takeaways: As a result of switching to the new service provider, storage held at the incumbent had to be transferred. Mattern is currently overseeing that process for the firm to ensure a seamless transition. Tanya Graybeal adds:

“Mattern has seen us through the beginning stages of the transfer and worked through the logistics on our behalf to get the best deal and best service provider for our needs. I would highly recommend Mattern in the future.”

Overall, Woods Rogers is in an improved position, financially, operationally, and strategically, and now enabled to implement its retention and destruction policy while capturing substantial savings. The firm’s Executive Director, Richard Wolf, concluded:

“Mattern did a great job for us. I appreciate their approach and tenacity.”

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