

Mattern Helps Burns & Levinson Analyze In-House vs. Outsourced Services. Firm Elects to Continue Outsourcing with Significantly Improved Contract

Opportunity:

Headquartered in Boston, Burns & Levinson LLP is a 125 attorney firm in 4 domestic offices. Firm leadership wanted to analyze the value of in-house versus outsourced services so Burns & Levinson could make the right decision to either continue to outsource and improve upon its outsourcing situation or to bring front and back office services in-house. In addition, the firm wished to refresh its MFD fleet.

Burns' leadership selected Mattern to lead the project. The firm's objectives at the onset of the engagement included:

- Unbiased assessment of current outsourced back and front office services:
 - Which services might still be required – how can they be improved/streamlined?
 - What services are not provided today, but needed in the future?
 - What are the best practices for such services?
 - How to best support satellite offices?
- Recommendations for bringing services back in-house:
 - What would be the pros and cons?
 - What would be the appropriate staffing levels and associated costs?
- Obtain monthly reporting with required stats from MFD provider.

Process:

Mattern performed a comprehensive review of the firm's outsourced staff and services provided along with the firm's MFD fleet based on usage during Covid while also accounting for post-Covid scenarios in its recommendations.

Based upon its evaluation and utilizing its industry knowledge and benchmarks, Mattern made key recommendations for both bringing operations in-house and continuing with outsourced services, all which improved service levels, elevated reporting and metrics, and improved contractual terms to ensure the provider lived up to firm expectations.

Mattern's recommendations included:

- An option to bring operations in-house, including an overview of resources required to ensure a successful operation.
- A secondary option to continue with outsourced operations with a focus to improve upon services provided, integration of unstaffed offices, reporting, hospitality and audio/visual needs.
- The firm also had Mattern evaluate the advisability of creating a dedicated client experience coordinator position in lieu of reception.
- Mattern provided extensive contractual recommendations to ensure the firm had a competitive, firm-friendly agreement with mechanisms in place to ensure the firm's expectations were met.
- Right-size MFD fleet based on current and future, post-Covid output needs.

After careful evaluation, the leadership at Burns & Levinson ultimately elected to keep operations outsourced, and Mattern assisted the firm in structuring a Request for Proposal (RFP) which captured the outsourcing recommendations from the evaluation process.

The RFP was sent to four (4) labor and equipment service providers including the incumbent. After reviewing responses from all service providers and meeting with each, the firm selected a new provider, Canon, to partner with for labor and equipment for a 5-year term

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Results:

A new contract was entered into with Canon incorporating key labor, equipment and contractual elements missing from the prior agreement to ensure a future successful relationship:

- Labor included a Community Experience Lead to focus on hospitality and audio/visual needs.
- Detailed service level agreements included to ensure proper service delivery.
- Labor and equipment scorecard with performance standards and penalties for service failures included to encourage high-level services.
- MFD fleet right-sized and standardized.
- Labor contract terms updated to include key items such as staff underage and untrained backfill credits, removal of non-solicitation, 100% backup for vacations and absences, staff turnover strictures, reporting requirements, and escalation caps.
- Equipment contract terms updated to include key items such as reporting requirements, uptime requirements, response time requirements, fixed pricing, flexibility, replacement of unsatisfactory equipment, and no installation or removal costs.

Client Comments:

Mattern has been terrific throughout this entire process and has taken time to make certain we are seeing the whole picture and thinking about all aspects of the RFP and onboarding our new provider. Mattern has been great!

- Jill Couillard, Operations Manager

Mattern's attention to detail has taken away (or at least reduced) my need to monitor every detail. They have been strategic about the process, careful in presentations, truthful in argumentation, and simply a pleasure to work with.

- Paul Morton, Chief Operating Officer

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