



The decision to change a company's methodology is not one that is made lightly. This undertaking is only entered upon with the proper information and for the right reasons. The areas of concern in analyzing this decision are:

- Processes – What will we be doing differently and how?
- Personnel – Who will we need to do this and how will we find them?
- Equipment – What will we need to be able to do this work?
- Profit – The most important factor of all. Will it make us more money and how?

Below are VersiDoc's answers to these questions.

### **Processes**

- How do you do this kind of work?

Right now, any legal document production shop numbers documents, whether or not they want to, can, or have any interest in imaging. Bates stamped copies plus additional sets are the bread and butter for companies like World Copy. The process of numbering large productions quickly and accurately has always been a challenge and many companies have devised methods to get the job done, while some have not quite solved it. The VersiDoc system takes numbering to the next level. Already World Copy is at the forefront of numbering in its market (New York City) and World Copy's current off-line numbering machine is a patented device that is highly sought after. However, that device will likely be obsolete once the conversion has been made to the VersiDoc digital-numbering method.

For those vendors that either don't yet do imaging, or do but want to do it better, the VersiDoc system has been developed through real-life experiences on difficult projects to work smoothly in a copy-shop environment with copy-shop personnel. Shops powered by VersiDoc will have the benefit of all of VersiDoc & World Copy's experiences in addition to having VersiDoc available as a resource for assistance in production, training, sales, client services, or custom work.

### **Personnel**

- Who do you need?

Before World Copy had VersiDoc they had a close relationship with a consulting firm that would assist on a project-by-project basis. However, this kind of contract-based work is usually on a project-specific basis. That is, consultants would require a detailed specification to solve a particular task. This was almost always on a job-to-job basis. When this arrangement became too expensive and no end was in sight, World Copy decided to bring the knowledge they required in-house. Since document production work is 24/7/365 work, there needed to be 24/7/365 coverage, management and staffing. This meant that more than one person would be required, so the difficulty of finding the right person multiplied into finding the right *people*. Management of an electronic document services department first requires a department manager that understands all aspects of the work that needs to be

done. Next, in order to fulfill their clients' needs, given that there are not very many tools available off the shelf, a programmer would be needed.

Once the volume of work becomes more than the department manager can directly oversee, shift managers will be required that also have some understanding of the underlying technology. Finally, a network administrator is required to keep all of the equipment running properly together.

➤ How will you find them?

There is no school for the knowledge needed for this work. There are some basic technological requirements but the combination of technically uneducated clients, specific, unique, always-changing job requirements, and the absence of any standardization requires a set of skills and capabilities that can only be developed over time and through real-life jobs.

One of the most difficult aspects of this search, from the owners' perspective, is how to interview applicants for skills that they themselves do not have. In addition, since there is more than one person involved, it becomes difficult for the owner to determine accountability when things go wrong. If he cannot make that determination himself, he can't even know if the managers' skills are lacking or if failures occur for some other reasons.

Fortunately for World Copy, it had a technically savvy owner. World Copy recruited the department manager and programmer with the appropriate technical skills, and over the three years developed their other skills, as well as the systems, required to get the work done. Being located in New York City provided a singular opportunity to study and develop these skills and systems, which can be used in any market. Every major firm has a presence in New York, usually their main office. Every kind of software is used in New York and many of the largest and most difficult cases and projects work out of New York. By not over-committing resources, World Copy set out to develop a universal process, including software and methods, that could be implemented elsewhere, not only the means to do the work themselves.

By forming VersiDoc, other companies will not have to go through this search, nor will they have to suffer through the long, and painful learning process before they can serve their clients satisfactorily. Now there is a school, in a sense and that school is VersiDoc.

➤ How much do they cost?

They are expensive. Workers in the information technology field are traditionally high-priced. Especially when they have the experience required for this kind of venture and the market is located in a major metropolitan area. It is hard enough for an IT manager to evaluate prospective technical hires, with inflated resumes and people who think they know more than they do. That difficulty is magnified when the interviewer does not have enough knowledge they are evaluating. Each of the two lead positions listed above are 6-figure salary positions. And the technical/managerial positions are probably more expensive than straight production-line managers with similar work experience. It is also for these reasons that VersiDoc solution is desirable. Companies powered by VersiDoc do not need to staff these people, they are

available through VersiDoc and their expertise is contained in the systems and procedures accompanying the VersiDoc method.

- Can you trust them to be your main contact with valuable clients?

Since a business owner, or their main customer liaison, may not understand the technical aspects of the jobs the company will be doing, inevitably the manager of the department will be in regular contact with the customers who require this kind of work. It is vital that the company not only trust the persons technical skills to get the work done, but they also need to trust that they can maintain client relationships in the way the company needs. Unfortunately, good customer relation skills do not always accompany information technology skills.

If you do trust the person, or people, in these roles to be your link to your valuable customers, what happens if they leave your company? Your client relationship may leave also and even if they do not, you will have a large hole to fill, very quickly, to maintain those relationships.

If you cannot trust your technical managers customer relationship skills, you may end up losing those relationships, or at the very least some of your work. Being able to fulfill the technical responsibilities of this role is great enough a challenge. It is quite a bit to expect that the person with those skills can also manage the flow of work, prioritize productions and maintain the ever so tenuous relationship of a relatively small vendor with a huge law firm.

- How vital are they to your business?

The final, and perhaps most important, question is how important is this person, or people, to your company. That is, what happens if they quit, are sick, or happen to be on vacation during a crisis? Because the answer is that they are absolutely vital, redundancy is almost a requirement. When a copy shop has a fleet of 15-20 copy machines that are relied upon all day and night, every day they will not staff their own repair technician. That would be a path to disaster. It is for this reason that companies like Xerox sell maintenance contracts with their equipment or companies like Danka will staff technicians on-site at copy shops with backup on call. When a position (besides ownership) is so vital to a small company, ideally they will contract that role out to a larger company who can support their needs under any circumstances. This is the role VersiDoc intends to fill for the positions in question here.

## **Equipment**

- What hardware and software do you need?

Even after the method and staff have been compiled, the next item in the checklist would have to be equipment. The decision to chose one type of copy machine over another was based upon the type of paper that will be copied, how quickly it would need to be copied and how long the equipment would have to last. Even though a Ferrari has more horsepower than a pickup truck, you wouldn't use it to plow a field. This same principal applies to the copiers, printers, scanners and software required to do high volume litigation document productions, electronic or otherwise. Again, only through experience do owners and managers of document production vendors find the

equipment best suited for their tasks and if a company wants to add a set of services they have not provided they will have to find out which equipment will best suit them. VersiDoc constantly tests and evaluates the most current hardware and software technology. The process is truly hardware-independent. It can print to any printer and scan from any scanner. Since computer hardware costs have dropped so low over the last several years, the amount of memory, storage capacity and speed is not a concern any longer. The question becomes which hardware to use. VersiDoc uses many multi-function machines, tests and evaluates their production capacity, reliability and actual earning capacity. We can offer suggestions as to which and how many machines to use based on projected volume. If a company that would like to be powered by VersiDoc does not currently have a computer network (as many copy shops may not) VersiDoc will install, configure and support the network as part of the relationship.

➤ What's out there and how does it work?

In order to make the determination of what equipment or software to use, one must know what their choices are and how they work. Unfortunately, there are not very many choices available for any of the tasks we are discussing here. Bates numbering is still done with stickers placed by hand in some shops. Most companies that can print for legal document productions have developed their own custom software that is project, or client-specific and it does not have universal application. There are many scanning options, but they are mostly designed to be used by the end-user, not a middleman like the vendor in this case. Even the major off-the-shelf options for scanning require consultants to install, configure, maintain and train the operators. VersiDoc has created a suite of software and hardware that can be easily installed and run by existing personnel, while backing everything behind the scenes.

➤ What do your clients use/need?

Most of the work produced, paper or electronic, will be used by a client that has some sort of system already in place. They will require paper to be delivered with certain tests, logs, or control sheets in place. They will need load files to accompany their electronic data or images that may not be provided with off the shelf software. The VersiDoc system addresses all of these concerns. With the flexibility to add to or modify the system, VersiDoc can keep up with any client request and there are multiple layers of quality control to check, and re-check that all deliveries are correct before they go to the client. Furthermore, if any company powered by VersiDoc needs a modification, it will be provided to all of the other companies powered by VersiDoc as well. There will be an ever-expanding set of capabilities that will keep VersiDoc vendors ahead of the curve.

### **Profits**

Obviously, the primary concern, in *any* business, is profit. The only true motivation to modify a profitable business is more profit. The VersiDoc system offers several ways to increase profits as well as ensure that vendors who have been in this industry for years will not be left behind by the changing times. It only makes sense that the company that is first to

handle documents in a production should be capable of being the last (if not only) vendor to do so. Clients can save money and time by not having to ship and receive their documents from a duplication and numbering vendor to an imaging shop to some coding house, while at each step one vendor has someone else to point at if there are any mistakes. Since the duplication/numbering vendor is usually the first in line, they have first dibs on the work. It is an easier sell to offer, while the documents are being copied and numbered, they can be imaged and OCR'd at the same time, especially if the costs are lower for them and profits higher for the vendor. Below are some of the ways being powered by VersiDoc can achieve these ends:

- Numbering Digitally – As mentioned above, every duplication shop in this industry does numbering. The crux of VersiDoc's numbering method is that paper will be scanned first and the images numbered online, then blown back on high-speed printers. VersiDoc's numbering method offers several profit-increasing facets
  - Man-time – The VersiDoc numbering system is quicker than any system on the market, without sacrificing accuracy or efficiency.
  - More Accurate – Numbering electronically avoids the age-old problems of missed numbers, numbers out of sequence, missed pages and plain old human error. Any system that involves humans numbering paper can go terribly wrong. The VersiDoc way eliminates both. A computer program numbers images and then the sequence is tested before printing begins. The output is 100% accurate – a boast that can rarely be made.
  - Easier Re-dos – Even if there are errors (the wrong prefix, the wrong boxes numbered, etc.) renumbering is easier than ever. It only takes moments to do the actual numbering and nothing is required other than the beginning number.
  - Image Byproduct – Perhaps the biggest benefit, and the largest boost in profit, comes from the fact that the VersiDoc way produces an image database *as a byproduct*. At no additional expense, and with ***no additional work***, vendors can offer a product that costs \$.17 a page at market rates (more than the initial numbering job) without having to do ***anything*** extra. It's pure profit.
  - Generates Blowback – Finally, an additional benefit to having images online is that the client would have no reason to go anywhere else to get additional sets. Instead of having to flag some subset, ship it to a vendor for duplication and then compare it to the originals, all they would have to do is send an e-mail with the bates ranges they'd like and printing can begin immediately, not to mention that it would not be a 2<sup>nd</sup> generation copy but the exact same quality as the master.
- Printing/Conversion – Besides copying and the numbering of client originals or copies, the next most common task required by document production vendors is printing. This is an area where very few are up to par with the clients' needs. There are even boutique companies that specialize in a small part of this process (converting documents to images). Any shop powered by VersiDoc will be a full service document production company. That means any tasks required to be

performed on a document can be performed by them. VersiDoc's model is to convert every document to a TIFF image prior to printing it. The benefits are:

- Imagebase Byproduct – Just as with numbering, having images left over as a byproduct opens doors, increases profits, and generates more work for the vendor.
  - Easier Tracking – One of the more annoying problems with tracking, and billing, print jobs is that they often require either some external tracking software or simply relying on meter readings to track how much was printed. Using images provides a more accurate method for tracking the work produced, and accuracy is paramount in maintaining profits.
  - Better Quality Control – Since each page is uniquely identified, and can be related back to the original file, quality checking is faster and easier, not to mention more reliable.
  - Prints anywhere – It doesn't matter which printers or drivers you have, TIFFs can print on all of them, often faster than the native files.
- Imaging – Storing more, transporting easier, and being able to search through the reams of paper generated in a document production is the ultimate aim of imaging the pages. With the VersiDoc system, the documents end up as images by default. Scanning them from originals or copies simply enters them into the process whose end is completely flexible, to meet the needs of the client and project. VersiDoc imaging can increase profits in the following ways:
- All profit from numbering or blowback – As was mentioned earlier, numbering and print jobs end up as images by default, so those pages never have to be scanned again. Normally, clients review blown back or numbered pages and then return the paper to a vendor to have it scanned. It seems ironic that the documents start out electronic, are converted to paper and reviewed, and ultimately returned to the vendor to be converted from paper back to electronic images. Since VersiDoc only numbers and prints electronic pages, that second conversion is unnecessary. This means that a good portion of the work that is currently being done can be done at an incredible fraction of the cost to the vendor.
  - Ready for any client – As was mentioned earlier, the VersiDoc system, unlike many others, is built to work with as many competing software packages as possible. Since our clients can use any database management system, they will not need to replace anything any existing software or procedures.
  - Supreme quality control – The VersiDoc imaging suite has quality checks at every stage. Not only are all of the industry-standard tests performed (page quality, orientation, number sequences) but also the system has the capability to create and run custom tests for any job. No longer will obscure, easy to miss instructions cause an otherwise smooth job to have to be redone and redelivered at great expense to the company and the client relationship.
  - Click charges anyway – Any other software on the market that serves the same purpose as the VersiDoc system does is accompanied by click charges. That is, every page that moves through the system has an associated charge

to the vendor. If the VersiDoc system offers so many more capabilities and so much increased revenue, why use anything else for the same price?

- OCR – one of the most common requests made after documents have been imaged is to capture the text in them so they can be searched. The VersiDoc system has devised a method that has outperformed all of the competition.
  - So fast it's like printing money – The VersiDoc OCR system runs in the background on any PC in the shop. That means that while a user is scanning on a scan station, that station can be OCRing at the same time. Instead of generating \$.12 per page, it is generating \$.12 per page, plus another \$.10 in the background. It is also so fast, that jobs that have taken other companies 40 hours have been completed overnight, unattended. It's almost pure profit, like printing money.
  - Integrated w/ imaging load files – Even though there are other OCR systems available, few if any, can boast full integration with any load file. The VersiDoc system can. Since the entire system is integrated, VersiDoc vendors can OCR files and export the same data to multiple clients using different systems at the touch of a button.
  - Quality control built in – VersiDoc's OCR output can be accompanied by customized accuracy results that can direct operators or clients to questionable documents, allowing OCR to add immense value to a scanned document production for little cost.
- Coding – Even though World Copy has found that this facet of the business does not mesh with document production as smoothly as some of the other steps, and very rarely do clients think to ask their duplication vendors for coding services, it is possible with the VersiDoc system. So, if a vendor wants to staff appropriately and become a coding house as well, they're more than capable to do so with all the same benefits.
- Digital Equipment – In the VersiDoc model, only digital equipment is used. The current generation of multi-purpose digital machines afford the following options:
  - Lower Click Charges – as compared to analog machines (the more common choice currently) digital machines cost less to run and therefore provide more profit per page.
  - Less Maintenance – In addition to paying a lower maintenance charge, they require less maintenance (hence the lower charge). This means that the machines are up and running more often and therefore can generate more revenue.
  - Multi-purpose – The latest crop of digital machines, that are finally capable of the level of production required by a shop like World Copy, can also function as printers or even scanners when they are not copying. This allows for greater volume in all services offered by a shop powered by VersiDoc.