



Outsourcing Office Support Services Management

Presented to:
Capital Chapter ALA



Today's Agenda

Key Benefits of Outsourcing
Trends in the Industry
Outsourced Services
Industry Challenges
Vendor Selection
Relationship Building



Why Outsource?

Top 10 Reasons Companies Outsource

1. Reduce and control operating costs
2. Improve company focus
3. Gain access to platinum level capabilities
4. Free internal resources for other purposes
5. Resources are not available internally
6. Accelerate reengineering benefits
7. Function difficult to manage/out of control
8. Make capital funds available
9. Share risks
10. Cash infusion

Source: The Outsourcing Institute





Why Outsource?

Top Reason Companies Outsource

To Gain a Valuable Partner that can provide

**Platinum Level Service
Subject Matter Expertise
and Resources**

that can

Save You Time and Money

Source: Nick Staffieri, CMDSM



Trends in the Legal Outsourcing Process

- 1) Firms leaving long-term relationships to search for greater innovation
- 2) Firms looking to outsource more litigation support functions
- 3) Firms looking to include records management as component to an outsourced solution
- 4) Firms looking to include more software and technology within the outsourcing contract
- 5) Firms looking for more visibility and communication from higher level team members
- 6) Firms looking to reduce production costs that were once billable to the client
- 7) Firms looking to engage consultants for the RFP Process

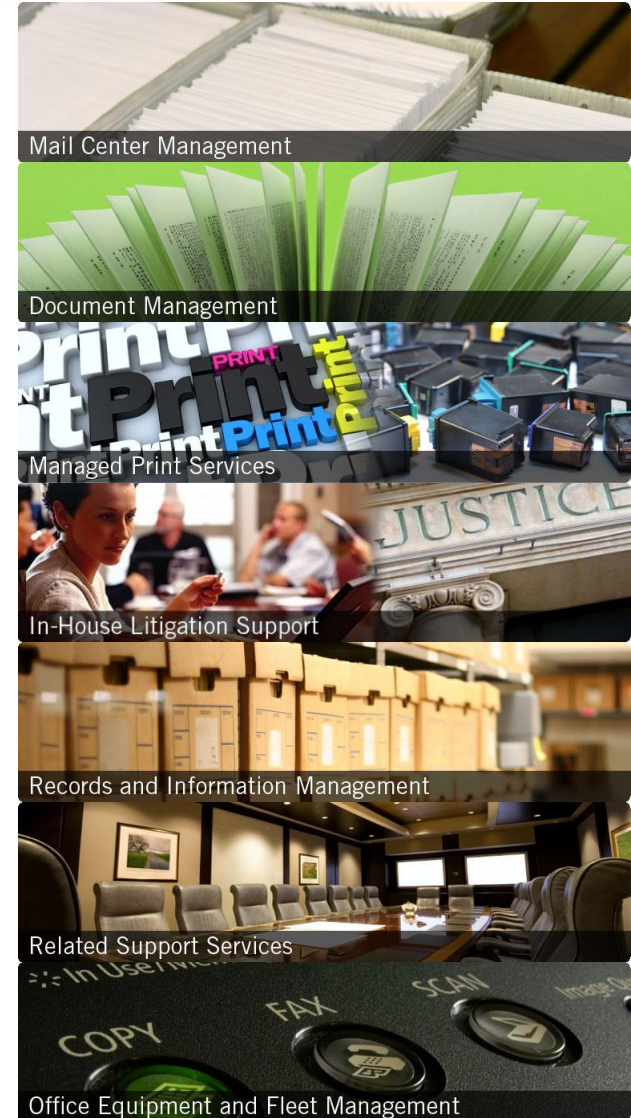




What to Outsource?

Services:

- Mail Operations
- Print and Copy Operations
- Print Management
- Courier and Messenger Services
- Document Imaging
- Litigation Support Services
- Records Information Management
- Hospitality
- Reception and Switchboard
- Equipment Fleet Management





What to Outsource?



Outsourcing Tip #1

Consolidate services to maximize the value of your outsourcing vendor

Outsourcing Tip #2

Outsource services to a vendor whose core functions include handling the services to be outsourced

Outsourcing Tip #3

Consider the business impact on segregated service areas and managed responsibilities



Challenges in the Legal Outsourcing Process

Firm Challenges

- Off-site support
- Coverage needs
- Access to resources and Subject Matter Expertise
- Keeping costs down



Vendor Challenges

- Responsiveness
- Coverage needs
- Having resources available when necessary
- Maintain service level and support with reduced margins



Vendor Selection

Top 10 Factors in Vendor Selection

1. Commitment to quality
2. Price
3. References / Reputation
4. Flexible contract terms
5. Scope of resources
6. Additional value-added capabilities
7. Cultural match
8. Existing relationship
9. Location
10. Vendor Objectivity



Source: The Outsourcing Institute



Vendor Selection

Top Factor in Vendor Selection

To Gain a Valuable Partner that can
provide

**Platinum Level Service
Subject Matter Expertise
and Resources**

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Save You Time and Money

Source: Nick Staffieri, CMDSM



Vendor Selection

On-site support and expertise for:

- a) Mail
- b) Reprographics
- c) Court Filings and Messenger
- d) Document Imaging
- e) Litigation Support
- f) Records Management
- g) Hospitality / Housekeeping
- h) Reception
- i) Technology

Resource and expertise for

- a) Fulfillment
- b) Heavy Litigation Copying
- c) Subpoena Services
- d) Litigation Document Imaging
- e) Litigation Support
- f) e-Discovery Processing
- g) Records Procurement
- h) Court Reporting
- i) Technology

In-House LITIGATION SUPPORT	Proven PRINT AND IMAGING	Turnkey DOCUMENT MANAGEMENT	Streamlined MAIL CENTER OPERATIONS	Comprehensive RECORDS MANAGEMENT	Versatile SHIPPING/ RECEIVING	Fluid E-DISCOVERY PROCESSING	On-Site PRINT AND COPY CENTERS	Expert PROFESSIONAL CONSULTATION
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Vendor Selection

What is their reputation within the industry?

How active and accessible are the management levels of the organization?

Are they responsive to both client and employees regarding the challenges faced within the industry?

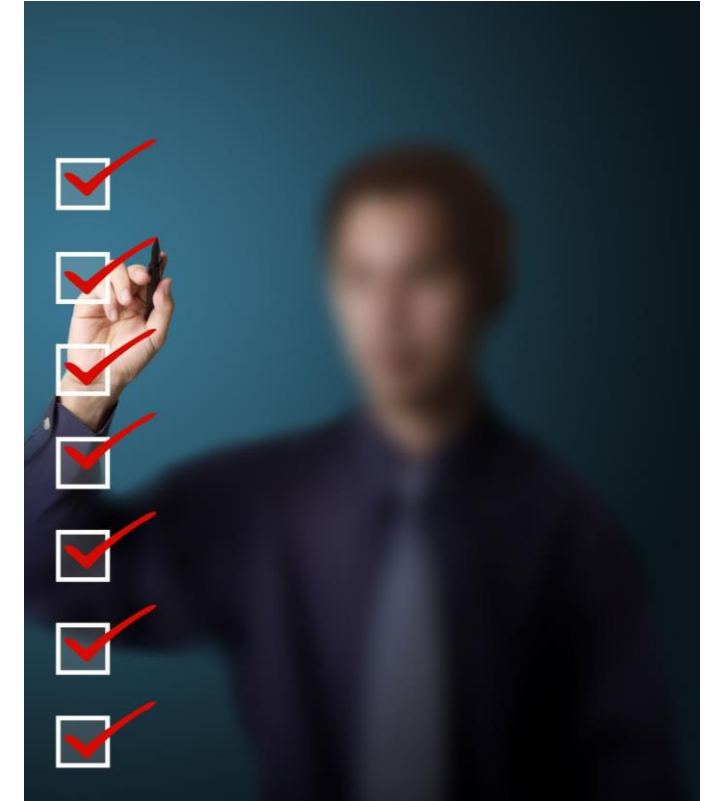
What is the experience level of the people who will be supporting your business?

What is their management philosophy regarding personnel?

What innovative ideas do they have regarding your operation?

How will they support your business through change?

What is their client retention rate?





The Outsourcing Relationship

Top 10 Factors for Successful Outsourcing

1. Understanding company goals and objectives
2. A strategic vision and plan
3. Selecting the right vendor
4. Ongoing management of the relationship
5. A properly structured contract
6. Open communication with affected groups
7. Senior Executive support and involvement
8. Careful attention to personnel issues
9. Near term financial justification
10. Use of outside expertise



Source: The Outsourcing Institute



The Outsourcing Relationship

Top Factor for Successful Outsourcing

The understanding that the business relationship is a **Partnership** that thrives on **Effective Communication** to work towards meeting both client and vendor Goals and Objectives

Source: Nick Staffieri, CMDSM



The Outsourcing Relationship

“Outsourcing is about relationships. Relationships are about trust. The key to successful outsourcing is a quality relationship built on open communication, teamwork, and mutual commitment to a common goal.”

-Compass America, “Can we talk – Building a Successful Outsourcing Relationship”





The Outsourcing Relationship

7 Keys to a Successful Outsourcing Relationship

- 1) **Create one point of contact**
- 2) **Find time for face-to-face contact**
- 3) **Be specific about organizational goals and objectives**
- 4) **Create reasonable Service Level Agreements**
- 5) **Be open to creative and innovative ideas**
- 6) **Share communications**
- 7) **Be honest and up front**





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