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LEGAL SERVICES

Does Outsourcing Your Help Desk Make Sense for Your Legal Firm?

Law firms employ a variety of solutions to support their IT infrastructure and end users. End users who range from a single in-house IT person as the go-to expert or a technology partner for Level 1 support all the way to a fully-outsourced solution that includes in-depth application support. All of these approaches can work; it comes down to what you are trying to achieve and the support levels your firm requires.

But maintaining an internal IT help desk with expertise in hardware, operating systems and applications to adequately support your law firm can be a daunting task – regardless of your firm’s size or practice areas. Conversely, outsourcing help desk functions to an experienced service provider can allow your firm to focus more resources and effort on your core competency –providing legal services to your clients. An outsourced help desk also allows your internal IT team to spend more of its time on high-level, strategic initiatives rather than just fighting fires. This helps the firm increase revenues and reduces operating costs.

Within this white paper, All Covered, the IT Services division of Konica Minolta, presents the major factors to consider when evaluating whether your law firm should outsource its help desk as well as some of the options for outsourcing. The choice is far from an all-or-nothing proposition.

We also give you helpful guidance on what to look for in a help desk partner and some of the key attributes to seek so you can ensure all your lawyers, legal support staff and other personnel can keep performing their jobs efficiently. By partnering with a leading help desk provider, you can ensure all your technologies enhance rather than hinder your business and legal processes.

Key Factors for Deciding Whether to Outsource

The decision to outsource your help desk often comes down to four key factors that law firms can use as starting points for their consideration: risk, expertise, availability and economics. The potential consequences of each factor can make the outsourced help desk model particularly appealing to law firms.

RISK: When law firms rely on a thin off-hours staff (or maybe even just one person) to cover help desk calls on nights and weekends, they run the risk of their lawyers and legal support staff being unable to quickly access the help they urgently need to complete work that’s due the next business day. And even during regular business hours, a well-staffed internal help desk may still get inundated with calls they simply can’t respond to quickly. Without back-up resources to turn to, legal proceedings may suffer delays.

The risk factor can come into play in several different areas. For example, when in-house engineers field calls after hours, on weekends and during holidays, it takes a toll on their morale. This could lead to employees burning out and leaving the firm. They may take the knowledge of your internal workflows, application configurations and countless other critical pieces of information with them. This could leave your firm crippled until someone else



performs a significant amount of discovery to understand your environment and to get up-to-speed for adequately providing help desk support.

EXPERTISE: IT personnel who work on an external outsourced help desk are experienced and have received training specifically geared towards working with a wide range of end-user competencies and technologies. Because the help desk is their sole focus, they are highly-trained in resolving issues remotely and by phone. They also receive continuous training to ensure they can support the many new technologies that emerge on a constant basis. By partnering with an outsource partner with experience specific to the legal industry, you also benefit from their knowledge of exactly how legal professionals work and their familiarity with applications and forms that pertain to law firms.

Expertise is also an important factor when evaluating how to structure your support team. It's not only understanding how applications work at a high level, it's also understanding the workflows of the firm and how the technology should work for the firm. By outsourcing your help desk, you can leverage the experiences of a technology provider that provides help desk support for many different legal firms. You thus benefit from their knowledge-base and practical experience.

Because help desk providers offer a higher level of expertise, their technicians can solve issues faster and keep your users productive and focused on billable activities. Their high-level engineers also specialize in certain technologies so they can troubleshoot, identify root causes, increase firm efficiency, and potentially prevent future issues from resurfacing.

AVAILABILITY: High-level internal IT resources are typically involved in strategic projects, which is naturally their primary job focus. So their availability for help desk activities is limited. And while entry-level IT resources are often assigned to primarily staff the help desk, they too seem to constantly get pulled into other projects. The result is that lawyers and their support staff can't always access the help they need.

The availability factor varies based on how a law firm has operated in the past and the firm's culture as well as the practice areas and levels of litigation a firm is engaged in. How dependent are you and your users on

your technology? How scalable is your support team if technology needs spike?

Typically, a much higher volume of calls occurs during periods of time following an upgrade or a change in applications such as the practice management or document management system. It's important to consider whether your support team can take

care of the increase in the volume of calls as well as the severity of the calls especially when users panic, thinking they have lost critical client information. IT support may not always be available when users need it.

An outsourced help desk team also features the flexibility to continually educate its personnel on the various technologies used by law firms. More importantly, they can do so without sacrificing service levels and the availability of help for your end users.

ECONOMICS: It may not make sense for your firm to invest in internal high-level IT resources that spend any amount of time on Level I help desk issues. This is especially true given that the majority of Level I calls can be handled efficiently by experienced personnel on an outsourced help desk. For any calls they can't resolve and need to refer back to your internal team, they can still facilitate solving the issue by collecting information and summarizing their triage efforts. Your internal personnel can thus limit the amount of time they spend on help desk issues.

The economics factor actually addresses multiple evaluation points. This includes the cost of maintaining a dedicated staff to handle support calls and hoping that the volume of calls will be enough to justify the headcount. At the same time, the law firm also needs to make sure it does not under-staff the help desk so as to exceed its capacity and subsequently delay billable activities while users wait for support.

Then there's the cost of keeping your help desk team trained and sufficiently knowledgeable about all of your existing hardware, software and applications. You may not have the flexibility to send someone to training for a week without putting the firm in desperate need while they're gone.

Law firms should also evaluate their internal help desk's experience across all of the firm's applications. Some engineers are strong on certain software such as Microsoft office tools or the operating system, but they lack experience in document management. By using an outsourced help desk, not only do you save on an engineer's time, you also save on end-user time and costs related to improved productivity.

It's Not an All-or-Nothing Proposition

A myth that holds many law firms back in their decision as to whether they should use an outsourced help desk is the misconception that outsourcing is an "all-or-nothing" decision – where you must outsource all help desk functions 24x7x365. In fact, when working with a leading help desk partner, law firms have the flexibility to outsource any single function or all help desk functions. They can also choose the days of the week and the time of day they want support, and they can vary their support according to seasonal or business-environment changes.

For example, some legal firms may want to outsource their help desk just during evenings and weekends. Others may choose to outsource only Level I and Level II support, but keep Level III and Level IV in-house, or vice-versa. An outsource partner with flexible options can also take on support for just a specific application.



A law firm may also want to keep internal generalists on staff for supporting Microsoft Word, Excel and PowerPoint but outsource their legal-application support on the pretense that generalists will keep up-to-date on all apps and might be experts in document management. But at the same time, they want users of their core critical legal apps – such as time and billing, cost recovery, and litigation support – to have additional access to outsourced resources. Using an external help desk for such applications typically costs less than hiring high-level resources.

The decision of what and when to outsource can thus be based on the specific business needs and the culture of the law firm. Each firm should consider outsourcing for solving different IT support issues and then determine which areas would be best to outsource to a partner. The leading providers will allow you to choose from a menu of support options and can guide you as to the best options for your firm.

Evaluating Potential Help Desk Partners

Some of the key attributes to seek in potential help desk partners include a demonstrable sense of urgency for solving issues and legal industry experience that helps maximize the productivity of your firm as swiftly as possible. Ideally, it's best to work with a firm that provides a help desk fully-staffed with multi-level engineers who can be allocated appropriately to each incident and who understand the specific needs of your firm.

Leading help desk providers will offer the option to assign dedicated account teams that leverage their legal technology experience and their knowledge-base as well as account-specific guidebooks. This approach enables their team to become familiar with your infrastructure and applications so they can minimize the time that members of your firm spend on the phone and away from practicing law.

Also check see if your potential help desk partner supports the wide range applications pertaining to the legal industry:

- Document Management
- Litigation Support
- Practice Management
- Time & Billing
- Table of Authority
- Document Creation
- Records Management
- Remote Access
- Cost Recovery
- Case Management
- Document Collaboration
- Imaging

As you evaluate potential partners, in addition to considering their specific expertise and offerings, it's also critical to inquire as to how they plan to get acclimated with your firm and your IT environment as well as your general processes for initiating, managing and following up on help desk incidents. It's best to partner with a firm that will adapt their services to the way you and your end users are accustomed. Also strive to set clear expectations, so that over time, both parties will know whether the help desk meets the stipulations of the service level agreement.

Getting to know your IT environment, your applications and the tendencies of your users up-front also plays an important role in how efficiently an outsource partner resolves issues. You don't want them wasting time asking questions or finding answers to basic information about your network, your applications and your devices. A help desk team that relies on an advanced IT service management tool, such as BMC Remedy, will have all this key information at their fingertips so they can immediately begin working on problem resolution.

Attributes of the Leading Help Desk Providers in the Legal Industry

The leading help desk providers in the legal industry generally provide personnel with actual legal experience. They know, for example, what a Table of Authorities and a Memorandum of Law form look like and how users interact with such forms. This can aid considerably when solving technical issues, even if the problem has nothing to do with a particular form.

KEY DISCUSSION POINTS

FOR KICK-OFF CALLS WITH YOUR HELP DESK PARTNER

- What are the historical call volumes per day, per week and per month? (to ensure the help desk is properly staffed)
- For which time periods does your firm need support: 24x7, evenings only, weekends only?
- Which internal procedures must be followed, such as which end users are allowed to place help desk calls: everyone, a certain department, or only IT personnel?
- What are the requirements of your internal IT team for accessing servers, network devices and user systems?
- What communication protocols should be followed for interacting with your IT team?
- Do you require a dedicated help desk support team, or is it OK to route your calls to anyone within the partner's help desk organization?
- Are there any chronic or on-going issues?
- What are the most common applications used by your firm?
- What types of software and legal forms require help desk support?
- What types of support are needed: Level I, II, III or IV? (The support may vary according to the application and/or end users.)
- Will you require immediate access to a high-level systems engineer who knows your network inside and out?

Industry leaders also offer experience in working with and have formed strategic partnerships with a wide range of software and hardware vendors—including those who offer solutions specific to the legal industry as well as those who offer general hardware and software solutions. Vendor relationships go a long way towards resolving problems, whether it's tapping into additional expertise or knowing how to escalate issues within vendor support teams. A help desk provider that knows your business and the vendor's technology can also serve effectively as the go-between in situations where it's difficult for either you or the vendor to translate what you are trying to communicate about an issue.

Another key attribute to seek is a partner with a help desk environment where everyone works in the same physical office. This allows them to more easily share their knowledge and help each other on challenging trouble tickets. Those that leverage a tool like BMC Remedy also benefit from a general knowledge base that includes documented solutions that have worked in the past for common problems.

BMC Remedy also facilitates help desk activities with a database inventory of all your hardware devices. The inventory can be collected by the provider with a remote or on-site scanning tool. They typically also leverage remote access tools like Bomgar, which allows them to take over control of servers and desktops (when given proper permission) so they can see exactly what end users experience during troubleshooting sessions.

Only You Can Decide What's Best

There are many levels of help desk support that can aid in addressing the technology challenges within a law firm. Some require 24x7 support while others just need an occasional backup resource on stand-by for increased or specialized demands. In other cases, firms simply grow tired of the blame game that sends their support teams chasing solutions through calls to numerous vendors until they finally land on a fix.

Whether outsourcing all or a portion of your help desk services is the right solution for your firm can ultimately be decided only by you and your key stakeholders. If you do outsource, be sure to partner with a provider that resolves issues and delivers information right when you need it. Your partner should also understand that your firm requires a customized help desk program with levels of support aligned to your specific business needs.

To learn about the help desk services that All Covered provides to law firms or to discuss other areas to consider when outsourcing your help desk, email us at legalteam@allcovered.com.



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