

*Your Field Guide to*  
**SUCCESS**  
with **RB8**



# **Your Field Guide to Success with RB8**

## **Introduction**

Welcome to the RB8 Field Guide to Success. As an RB8 user, we believe you have a great tool for achieving business success, but perhaps there are aspects of RB8 you are not aware of that could help you achieve your goals faster.

This Field Guide is organized into sections that lead off with RB8 axioms. These axioms are truths you may not know about for getting the most out of RB8, but which we believe you will find self-evident after reading this guide.

This is not a user guide, instead it is a guide to assist your company's strategic thinkers in running a professional, profitable operation with RB8. In addition to RB8 axioms, each section explains important procedures and includes instructions you can provide to staff responsible for implementing them.

Your staff may already be following some of these procedures, but perhaps incompletely so they are not as efficient as they could be. This guide explains why your business would want to do things the recommended way in RB8.

We hope you find this information helpful and that you keep this guide handy and refer to it often.

## **Table of Contents**

<b>Axiom 1: Keep clients informed (without interrupting their day) . . . . .</b>	<b>5</b>
<b>Axiom 2: You are in the business of marketing . . . . .</b>	<b>8</b>
<b>Axiom 3: Retain reporters by keeping them happy. . . . .</b>	<b>13</b>
<b>Axiom 4: Automate your business. . . . .</b>	<b>16</b>
<b>Axiom 5: Outsource to improve profitability . . . . .</b>	<b>22</b>
<b>Axiom 6: Expand your company's reach through collaboration . . . . .</b>	<b>24</b>
<b>Axiom 7: Prepare for disasters . . . . .</b>	<b>25</b>

**Axiom 1:****Keep clients informed (without interrupting their day)**

As you probably already know, communication is important, in fact it has been said that you can never contact clients too much. But you don't want to be seen as an interruption. Keeping people informed without interrupting them is key.

RB8's calendar includes several automated email procedures for informing clients about the status of their requests and jobs unobtrusively. These emails also work as a way of passively marketing your business by keeping your company, not just an individual reporter, in your clients' minds.

Just as importantly, these emails can eliminate misunderstandings by providing clients with a copy of your version of events. Establishing this paper trail is important in case a client should ever consider pressing a law suit against you for a perceived default of service.

**TIP**

Another way you can communicate with clients without interrupting them is to use RB8's Short Message Service (SMS) text messaging to send a short message to someone's cell phone.

From the person's contact screen in RB8, click the message button next to the **Mobile Phone** field. Then type your message and click **OK**. It's easier than texting from a cell phone and faster than calling.

## Communication

***Email request acknowledgment as soon as job is set***

When you receive a new job request from a client, it is a good practice to send an acknowledgment to let the client know that you have received the request and will call a day before to reconfirm the job.

RB8 makes it easy with email confirmations that automatically include job information from your calendar settings in an attached PDF file. Use RB8's default confirmation email and attachment form as is, or create your own by editing the defaults provided.

1. Right-click on the job you just entered, then choose **Send Confirmations**.
2. If you want to:
  - **Use a different confirmation form**, select one in the **Form Name** drop-down.
  - **Change the subject line and/or the message of this email**, check the **Show mail composer for Email** box.
3. Right-click on the job, then choose **Send**.

Communication

### ***Email cancellation confirmation as soon as job is cancelled***

When a job is cancelled or rescheduled by a client, it is critical to send a confirmation to let the client know that the original job setting has been cancelled by the client. This will protect your firm from a possible law suit in the future.

1. Right-click on the job you just cancelled (or rescheduled), then choose **Send Confirmations**.
2. If you want to:
  - **Use a different cancellation confirmation form**, select one in the **Form Name** drop-down.
  - **Change the subject line and/or the message of this email**, check the **Show mail composer for Email** box.
3. Right-click on the job, then choose **Send**.

Communication

### ***Confirm next day's jobs by email***

Instead of calling each client to confirm the next day's job, send confirmation request emails to all clients at once first thing in the morning. Then follow up with phone calls for those clients who have not replied within a certain allotted time. This practice will save you time by reducing phone tag with your clients.

1. In **Calendar > Send Confirmations**, click the eraser (at the lower left) first to clear all defaults. Specify **Job Date From** and **Job Date To**, then click **Search**.
2. In the **Form Name** drop-down, select the confirmation request form.
3. Check the **Show mail composer for Email** box (at the bottom left) so that you can personalize the subject line and the body of the email message for each client.
4. Highlight all jobs. Right-click on the grid, then choose **Send**.

#### NOTES

##### **Create your own forms:**

Use **Tools > Form Manager** to modify RB8's default templates.

##### **Change the default settings for the subject line and body of emails:**

For job confirmations, use **Tools > System Preferences > Confirmation Email**.

For cancellation confirmations, use **Tools > System Preferences > Cancellation Email**.

**TIP**


In RB8, two email addresses (Email and Confirmation Email) are provided for each contact. Since most attorneys are not crazy about receiving confirmation emails, whether it's about new settings or cancellations, put the email address of the attorney's secretary or responsible paralegal in the Confirmation Email field (in the Additional tab). Confirmation emails will then go to the secretary or paralegal, not the attorney.

The attorney's email address should be entered in the Email field. This email address will be used to notify the attorney when files are available to download from the repository.

## Communication

***Send clients their job calendars***

Do you have clients who are working on cases involving many witnesses (including experts)? It's not hard to imagine how much hassle your clients are going through to keep their calendars up to date with all the changes taking place on a daily basis. Be a hero. Send clients their job calendars by email with virtually no effort on your part.

1. In **Calendar > Export Calendar**, select the client firm (required), then if desired, a single contact.
2. Set the **Job Date From** and **To** fields to the desired range (for example, from tomorrow to two weeks in the future).
3. Select the case and click **Search**. All relevant jobs appear.
4. Click .
5. In the Export dialog box, select MAPI in the **Destination** drop-down, then click **OK**.
6. In the Send Mail dialog box, enter **To**, **Subject** and **Message** text, then click **Send**.

**Axiom 2:**

**You are in the business of marketing**

No matter what business you say you are in, you are also in the business of marketing. Marketing is about attracting clients, getting them to use your services, and then making sure they are happy with your service so they come back again. In fact, you might say that you are in the business of marketing first, because you don't have a business if you don't have clients.

As a company leader, you need to include marketing in your business focus. And while we can't provide a "one size fits all" marketing strategy because every firm is unique, RB8 does offer some tools to help you implement your own marketing strategy.

Marketing

***Know who is calling***

You can easily see who your best clients are by looking at the number of calls they generate. This is better for your marketing staff to know because total invoice amounts can be misleading – a lot of work is billed to third parties, such as insurance companies whom you don't market to, and a lot of a law firm's invoices might be copy orders on jobs they didn't initiate.

1. In **Calendar > Calendar Analysis, Date Type** defaults to Entered Date and the date range defaults to today. Change the search filters as needed, then click **Search**.
2. RB8 counts new and cancelled jobs in the calendar by firm, broken down by attorney, so you can see how many calendar settings you are getting from each client.

Marketing

***Know who has stopped calling***

How many clients does your firm lose every year? With churn increasing and customer

**TIPS**

**Marketing with RB Web:**

RB Web is a round-the-clock marketing tool for your business. Some ways to win new clients and cross-sell services to existing clients:

- Give copy order clients access to their transcripts online.
- Offer online case repositories.
- Offer a combined calendar to all parties for the case.

**Holiday gift lists:**

The best way to come up with a meaningful holiday gift list is to run the Calendar Analysis report sorted by the number of net jobs. Then you will know which clients are generating the most business for your firm and to whom you want to send gifts of appreciation.

Sort By:

Number of Net

**Points plug-in:**

Calendar Analysis reports list firms and their attorneys. For a more complete tracking of who is calling in job requests and whom you would like to reward, you need the RB8 merit points plug-in. The points plug-in tracks not attorneys, but also secretaries and paralegals. Visit our website for details.

**Free marketing materials:**

Check our website for free marketing materials to help you promote your business.

loyalty fading, winning back and keeping lost clients has never been more critical. According to a marketing study, your chances of winning back a former client are statistically two to four times higher than landing a new one.

Clients defect for different reasons, and some clients, frankly, aren't worth winning back. Careful evaluation and categorization let you select the most valuable clients to target, then develop individualized strategies to win back each type of client. Use RB8 to generate your list of lost clients, so you can target your marketing to them.

1. In **Inquiry > Marketing Inquiry**, select **No Calendar Contacts** in the **Type** drop-down.
2. In **Scheduled Date From/To**, enter the period you want to analyze.
3. Click **Search**. RB8 lists contacts who called at least once during the previous period but have not called for the specified (current) period.

## Marketing

### ***Know what clients prefer***

With today's cutthroat competition from all sides, trying to compete on price can be a quick road to ruin for a small company. Contrary to common perception, clients will not go almost anywhere just to save a buck. What your business needs to stand out is better client service and satisfied clients.

One sure way to impress clients is to remember their preferences. Utilize the Preferred Services feature in RB8 to remind your scheduling and production staff of clients' preferences. It's about time to get rid of those yellow sticky notes on the wall.

1. In **Setup > Contacts**, locate an attorney.
2. In the attorney's detail window, click the **Preferred Services** tab.
3. Click **New**. Then select service preferences in the drop-downs and enter any additional information in the **Instruction** field.
4. Click **Save and Close**.

#### TIP

Categorize lost clients using the **Rating** or **Misc. Code** field in the **Contacts** table to help you when developing a marketing strategy for winning them back. Here are some suggestions:

- Lost – Intentionally pushed away
- Lost – Unintentionally pushed away
- Lost – Pulled away
- Lost – Bought away
- Lost – Moved away
- Lost – Variety seeker

#### NOTE

The preferred services will appear when the **Prefill Services** function is used in **Calendar Manager** or **Turn-in**.

Marketing

## ***Provide online case repositories***

Who needs online case repositories? We'd like to suggest that your clients do. Even if your clients haven't asked for one yet, even if they don't know what one is; we think you will find, as other RB users have, that you can increase your business and increase client loyalty with online case repositories.

Of course, there are many ways to get a case repository online — most of which are cost prohibitive and too complex for a small agency. But with RB8 and RB Web, you have built-in case repositories. As one of our clients found, it's profitable and "so easy a caveman could do it." Here's his story:

### **Online repository case history**

When a local lawyer asked RB user Jim Colville (Colville & Associates LLC, Tucson, AZ) if he could handle an online case repository for a complex-litigation case involving multiple parties and lots of documents, Jim was ready with RB8.

He hadn't used it yet, but after a half-hour consultation with OMTI about setting up case repositories (included here), he put together a demo repository for the lawyer, who logged on, downloaded files, and then said, "OK, that's what we want." The demo was all Jim had to do to get the job.

### **Problems encountered**

His only real problem, he said, was scanning documents. His scanner is also the office copier, so scanning could only be done after hours. Plus, the set-up wasn't efficient: "You almost need the scanner as close as your mouse, and ours was way across the room. It was all back and forth."

Combined with his in-house problems was the condition of the documents to be scanned: different paper sizes, wrinkles, staples, faded fax printouts. After 44 hours of scanning, only 2 boxes of documents had been scanned – out of an initial 20 boxes.

Outsourcing became the solution. It was faster and cost effective for a company without a dedicated scanner system.

Other non-RB issues Jim had to deal with in setting up a repository were: deciding on a naming system for all the files that made it easy for parties to locate particular files (Jim used a 3-letter case prefix and Bates numbering) and client complaints about long download times for files (caused by the end users' obsolete equipment and slow Internet connections, which Jim had no control over).

### **Results**

Overall, it was a huge success. All of the parties took advantage of the repository, and one party called Jim to said he was so glad to be rid of "Mother May I." With other



systems, he had to fill out a file request form, then it took 4-5 days to get the document. With RB, he could download and print files himself.

The next step for Jim is to turn all the parties involved into clients for transcripts on the case. “Only two parties to this case out of seven total are our clients. The repository gives us high-level introductions to five new, potentially bigger litigation clients.”

Jim is promoting RB Web’s online case calendar to all parties, with the idea that on a complex-litigation case, it makes it easier for everyone to manage their schedules if they are all in one place. If they all use Jim’s company for this case, everyone can track not only their own depositions, but all of the case depositions easily. Plus, they will then have online access to RB-PDF transcripts of all the depositions in the case.

Jim anticipates an easier-than-normal sell, due to the online case repository’s popularity: “I don’t have to beg them to let me show them what I can do. Instead, they have to see it.”

## Marketing

### ***Set up a case repository***

To give parties to a case online access to case files, you must set up the case in RB8, add parties to the case (entering their firms and other information into RB8), assign passwords and user IDs to parties, scan and upload documents into RB8 and turn on access through RB Web.

In addition to setting up case parties, scan and name case files using your company’s scanning software or a third party. Then upload the case files to RB8’s central repository and make them instantly available to case parties on RB Web.

1. In **Calendar > Case Manager**, click **Actions > New**, then enter case information in the New Case window.
2. Click **Save**, then click the **Parties** tab.
3. Click **New**. In the New Party window, click the binoculars button. In the Lookup Contact window, enter the party’s name (can be a partial name), then click **Search**.

#### RECOMMENDATIONS

##### **Scanning:**

Outsource scanning to a copy service.

If you want to do it in-house instead, get a quality scanner, learn how to use your scanner software, and set up an efficient work space for scanning.

##### **File naming conventions:**

Come up with a consistent, easily understood system early on. For example, using documents’ Bates numbering with a 3-letter case name prefix.

##### **Cross-sell:**

Once you have parties to the case using the online repository, offer them a case calendar. Download the generic case calendar letter from our website to get you started.

Use the transcript repository in RB Web. Send copy clients email notices that their files are available on RB Web.

4. If the party is listed, double-click it to select it. If the party does not appear, click **New** and enter the party's information in the New Contact window. Be sure to assign a **Web Account Name** and **Web Password** on the Additional tab. Then click **Save and Close**.
5. In the New Party window, enter information about the party and check that **Allow case-level repository access in RBWeb** is turned on.
6. Click **Save and Close**.
7. Repeat steps 3 through 6 to add additional parties.
8. To add files to the case repository, click **Case-level Repository**.
9. Click **New**. In the New Upload window, click **Select Files**. In the Open window, locate the folder that contains the case files. Select the file(s), then click **Open**.
10. Update the file information for each file listed in the grid, and click the **Publish** checkbox to make this file available to parties through RB Web.
11. Click **Save and Close**. RB8 uploads the file to the repository.

**NOTE**

**Planning to offer parties access to the case calendar and try to win their depositions on the case?**

In the New Party window (step 5 above), check that **When jobs are created, automatically add to the job parties** and **Allow calendar access in RBWeb** are both turned on. This way, you won't overlook anybody when setting a job, and they will be able to view the case calendar in RB Web.

**Axiom 3:****Retain reporters by keeping them happy**

Due to a shrinking pool of qualified reporters, combined with our increasingly litigious society, continuing technological advances, and the mainstreaming of the hearing-impaired, it is harder than ever to attract and retain good reporters.

Since the work you offer is pretty much the same as the competition's, you need to offer desirable benefits to differentiate your company from other firms. In addition to the expected competitive pay, flexible hours and telecommuting, you can offer much more through RB8 and RB Web, such as bonus pay and direct deposit, which reporters will appreciate and which won't be an administrative nightmare.

Retention

***Keep reporters informed without interrupting their day***

SMS (Short Message Service), commonly referred to as "text messaging," is a service for sending short messages of up to 160 characters to mobile devices. SMS is similar to paging. However, SMS messages do not require the mobile phone to be active or within range and will be held for a number of days until the phone is active and within range. Use SMS to notify reporters of their job assignments easily and reliably.

1. In **Calendar > Notify Resources**, set **Job Date From** and **Job Date To** as desired, then click **Search**. RB8 lists all the assigned jobs for the date range selected.
2. Right-click on the grid, then choose **Check All > SMS**.
3. Right-click on the grid, then choose **Notify**.

**NOTES**

When you enter the mobile phone number of a resource, you must add the prefix "1" to the number for SMS to work (e.g. 1-555-123-4567).

Resources can acknowledge jobs wirelessly via a web-enabled cell phone or PDA such as a BlackBerry by logging onto your RB Web and clicking the job's **Acknowledge** link. They can also get job details and *MapQuest* directions to the job's location on their mobile device.

Retention

***Offer direct deposit and online pay statements***

Did you know you could save anywhere from \$1.00 to \$2.50 per payment by using direct deposit instead of paper checks? In addition to substantial cost savings, there are other benefits:

- Direct deposit eliminates manual check preparation and mailing.
- Direct deposit payments never get lost or stolen.
- Direct deposit adds one more incentive to competitively attract reporters.

ACH (Automated Clearing House) is the electronic funds transfer system used to transmit funds such as direct deposits and other monetary transactions from one bank account to another. The ACH system is governed by the rules of the National Automated Clearing House Association (NACHA). This system provides for the inter-bank clearing of electronic entries for participating financial institutions.

Once you sign up for direct deposit with your bank, all you have to do is send a NACHA-formatted file (exported from RB8) to your bank. Funds are automatically deposited into your resources' accounts, so they never have to wait for a check in the mail, then go to the bank to deposit it. Plus, many banks waive monthly fees for customers with direct deposit, so your resources save money in addition to enjoying the convenience and security of direct deposit.

If you have RB Web, reporters can access their pay statements online so that you do not have to mail them paper statements. Reporters don't have to worry about losing their pay statements – they can access them anytime online. And you save time and money by eliminating paper handling.

1. In **Payables > Print Checks**, select the current pay date (that was just closed).
2. Click **Search**. RB8 lists all the resources being paid for the current payroll along with their check amounts.
3. Right-click on the grid, then choose **Export > NACHA**.
4. Enter the effective date (as described in the dialog box) and click **OK**. The default is two days from today's date.
5. In the Save As window, type a filename in the **File Name** field, then click **Save**.

**IMPORTANT**

Before using direct deposit, you must enter the required NACHA settings in **Tools > System Preferences**.

Retention

### ***Provide online case repositories for sharing files***

When you have several reporters working on the same case, it can be very useful for them to share certain files such as master word index. RB Web 8 online offices for reporters are integrated with RB8's built-in central repository, so you can upload files from the office for reporters to access online and reporters assigned to the same case can share files through the case repository.

1. In **Calendar > Case Manager**, locate a case.
2. In the case's detail window, click the **Case-level Repository** tab.

3. Click **New**.
4. Click **Select Files**.
5. In the Open dialog box, browse for the file(s) you want to upload, then click **Open**.
6. In the New Upload window, click the **Publish** checkbox and choose an appropriate **Access** level.
7. Click **Save and Close**. The file(s) upload to the repository.

**NOTE**

Reporters can upload case files to share, such as master word indexes, and download files through RB Web's **Repository** tab. Job files, such as transcripts and exhibit files, should be uploaded through RB Web's **Turn-in** tab.

## Retention

***Offer incentive bonus programs***

Well-planned incentive bonus programs can help you attract and retain highly talented reporters. For example, when new reporters walk in the door with attorneys already in their pockets, use the **Client Of** feature in RB8 to:

- Track the amount of the business being generated from those attorneys; and
- Pay an incentive bonus based on the new business generated.

Encourage (and reward) all of your resources to be a marketing force. After all, they interact with attorneys who are not your clients every single day. If any resources bring in new clients, track and pay them incentive bonuses too.

1. In **Setup > Contacts**, locate a resource's client attorney.
2. On the contact's **Marketing** tab, click the lookup button next to **Client Of** to specify this contact's resource who qualifies for bonuses.
3. Click **Save and Close**.
4. In **Setup > Resources**, locate the resource.
5. On the resource's **Pay Info** tab, enter percentages for Client Of jobs which the resource covers and those covered by other reporters.
6. Click **Save and Close**.

**TIP**

When you are ready to pay the incentive bonus, go to **Payables > Sales Commission Report**. In the **Commission For** drop-down, select Client Of to generate a list of commissionable invoices.

## **Axiom 4:**

### **Automate your business**

The fact that you use RB8 shows that you understand that automation is important to the survival of your business. But for your business to grow and thrive, you must be using automation to its best advantage. Automated systems can save you time, money and energy, and attract more clients to your company when implemented correctly.

The benefits of using an automated industry-focused business system are many:

- Virtually eliminate errors, thereby ensuring that information is accurate.
- Reduce the time it takes to complete tasks by reducing complex tasks into one simple procedure and having the system perform more business functions.
- Significantly increase productivity by eliminating manual, fragmented, redundant and repetitive tasks.
- Increase management awareness & control due to knowledge stored and analyzed by the system.
- Fulfill business tasks from anywhere so you do not need as large a central staff, people can telecommute, and even clients and reporters can reduce some of your workload by doing some things themselves.
- Accomplish more by freeing staff to focus on high-value, high-return activities.
- Provide valuable services to clients, such as downloadable PDF transcripts, and perks to resources, such as direct deposit, without increasing your overhead.

Of course, RB8 does not provide the benefits alone – proper usage provides the benefits. Training is important for the successful implementation of any automated process. RB8 offer free training online. You can also get onsite customized training.

The problem with the misuse of RB8 is lost productivity – if you are not using RB8 as designed, you are probably not using it as efficiently as possible. You may think that is not a big deal – you are comfortable doing things the way you have always done them, so what if it takes a minute or two longer here or there?

The big deal is the accumulated wasted time that could be spent doing other things. If your time-wasting activities amount to an hour a week, that adds up to around 50 hours a year you could be spending on profitable pursuits – or personal interests, or anything other than inefficient, repetitive tasks. And consider that if you have a staff similarly wasting time like this, each one is adding their own 50 hours of non-productive time to your business.

Using RB8 correctly does not mean that it is a rigid system with only one way to accomplish things. RB8 is designed to be flexible and customizable. For example, you set up service lists

#### **TIP**

RB8 is full of automated processes. If you seem to be performing repetitive, redundant tasks in RB8, you are probably not using it most efficiently. Review your work processes and consult with RB Support. If you need more in-depth help, you can hire OMTI to consult with you and provide customized training on-site to maximize your company's efficiency.

to match your company’s offerings. And you can use as many or as few RB8 modules as you like, so if you only want a calendar/billing system, you’ve got it. With RB8, you can develop business systems to improve your efficiency and effectiveness, building on the storehouse of best practices and years of development already contained in RB8.

Automation

**Make RB8’s central repository work for you**

Make your office paperless with RB8’s central repository. Eliminate filing cabinets. Instead of filing faxed notices, signed copy orders or delivery slips, scan them into your central repository where they are linked to a case, job, witness, invoice or firm.

Save time by uploading multiple files at a time. Documents can be linked to a case, job, witness, invoice or firm. If documents are ‘published,’ contacts and resources can access them through RB Web. The chart below summarizes the repository in RB8.

FILES	WHERE TO UPLOAD	WHAT TO UPLOAD	IF PUBLISHED, WHO CAN ACCESS THROUGH RB WEB
<b>Case-level</b>	Case Manager	Pre-discovery documents  Case word list	1. Any contact listed in the Case Parties tab with the <b>Allow case-level repository access</b> checkbox marked  2. Any resource assigned to any job belonging to the case
<b>Job-level</b>	Calendar Manager	Notices Errata Sheets Copy Order Forms	1. Any contact listed in the Job Parties tab with the <b>Allow job-level repository access</b> checkbox marked 2. Scheduling contact 3. Any resource assigned to the job
<b>Witness-level</b>	Turn-in (step 1)	Transcripts Exhibits Reporter’s Bill	1. Any contact who is billed for the witness 2. Any contact listed in the Job Parties tab with the <b>Allow witness-level repository</b> checkbox marked (3rd party access) 3. Any resource associated with the witness
<b>Invoice-level</b>	Billing	Invoices	The (Sold To) contact associated with the invoice
<b>Firm-level</b>	Firms	Quotes Contracts	Do not publish (for office use only)

**NOTE**

You are not fully utilizing RB8’s built-in central repository, if the following (time-wasting) activities are still going on in your office:

- Notices are being faxed (or emailed) to reporters
- Errata sheets are being faxed (or emailed) to opposing counsels
- Invoices are being reprinted to be faxed to clients
- Collection staff is going through job folders looking for copy order forms
- Reporters’ bills are stuffed in the payables folders

Automation

***Streamline transcript production and archival***

RB8 includes a free conversion program for turning reporters’ ASCII files into PDF transcripts. Adobe PDF has become the standard for storing and exchanging digital documents in the legal community. In fact, it is mandated for most electronic filings in federal courts, and many state and international courts are implementing similar requirements. The courts like it because:

- Documents can be created in any application, then easily converted to PDF.
- It retains the appearance of the original document and is read-only so it can’t be tampered with.
- It can’t be infected with computer viruses.
- It is a universal file format, which can be read on any system using the free Reader.

If you are not yet providing your clients with RB-PDF transcripts, you might find the following true story from an RB8 user enough encouragement to try:

**RB-PDF transcript case history**

Gloria Perry (General Manager, Associated Reporters, Las Vegas, NV), a long-time RB user (since its DOS days) is what we would call a sensible “early adopter”:

“At Associated Reporters, we’re constantly trying to find new ways to streamline, save time for our employees, and make the most of the resources we have,” she says. “And when RB comes out with a new service, I’m always excited to see if it will provide a more efficient solution for us.”

**NOTE**

RB-PDF transcripts have many advantages over other formats. Some of its benefits:

- Full-text searchable across multiple documents simultaneously
- Condensed transcripts
- Accepted as an email attachment through company firewalls
- Printable and hyperlinked word indexes
- Linked exhibits
- Attachments, such as original ASCII
- Digital signatures
- Preferred format in the courts for e-filing and archiving
- Can be saved as an image file for trial presentation purposes
- Bates numbering, true redaction and metadata removal capabilities



Her process of evaluating and implementing RB-PDF transcripts was typical of her combination of speedy implementation and caution.

### The set-up

“We were using e-Tran[script] for transcripts, but it was slow compared to RB PDF. There was a lot of typing of information and not many archiving options through e-Tran. We couldn’t really store many transcripts in it, so we had to use something else for archiving. We were spending a lot of time not only creating the e-Transcript, but also jumping from application to application.”

In January 2007, OMTI released the free RB8 update that included the RB-PDF transcript creator.

“The second we got the update, I started testing it out,” Gloria said. “Within a day or two, I was able to come up with new procedures and gave them to our production department for implementation. Very quickly, we could see how much time it (RB PDF transcripts) would save us.

“After our archiving person used it for a short time and saw that it would save her so much time, she said, ‘I don’t want to go back to e-Tran. Please don’t make me’.”

### The benefits

Gloria and her production team are sold on RB-PDF transcripts and RB8’s central repository: “There’s no typing, you can archive the PDF transcript and your ASCII in RB8 along with the job,” Gloria said. “We scan in worksheets, corrections from witnesses, letters to attorneys and witnesses, and copies of payment checks. Everything is there at our disposal.”

In e-Transcript, they had to type in job information for each transcript. “Typing is slow, and you might make mistakes. With RB, we can create the PDF transcript with the click of the mouse, with no typing if the info was correctly entered earlier — the job information is already there.”

They knew they had to get their clients to switch to PDF transcripts. “It really made a difference in our production department. It saved us so much time that we knew we had to convince our clients to go with this instead of our clients convincing us to go back to what we had been using.”

To sell attorneys on the benefits of RB-PDF transcripts, Gloria prepared a list of advantages, which she gave to her reporters to use when talking to clients. For example, the fact that with RB-PDF transcripts they wouldn’t need third-party software to load transcripts into trial presentation software is a huge advantage for attorneys at trial time.

#### TIP

Promote your company’s PDF transcript service with the RB-PDF transcript flyer available on our website. It includes Gloria’s list of benefits, explains RB-PDF transcripts to your clients, and provides instructions for using them.

## The drawbacks

The first problem was simply getting attorneys to change. People in general don't like change, but with the mandate coming down from the federal courts to use PDFs for electronic filings and archiving, there was already a reason to change. Giving attorneys a list of advantages helped persuade them to try PDFs.

The next problem was that, as an early adopter, Gloria and her team were using a version 1.0 application so they encountered bugs, which they had to work around. Their feedback was worked into newer versions of the transcript creator so now, "Someone could do this (convert production to PDF transcripts) overnight if they already used e-Tran & RB8," Gloria said.

Some problems still exist. For example, even though RB-PDF transcripts offer exhibit linking, "We can't use exhibit linking because it's too time consuming," Gloria said. "Although, we didn't use it with e-Tran either. We could provide exhibit linking on a client-request basis, but we could not offer it as a free service. Realistically, it's not possible to do with every transcript."

## The results

None of the problems Gloria has encountered have dimmed her enthusiasm for RB-PDF transcripts. Because much of Associated Reporters' work involves complex litigation cases, involving multiple parties, lots of documents and numerous depositions, PDF transcripts have a particularly strong appeal to their clients because 1) Associated Reporters can provide image files for importing directly into trial presentation software, and 2) attorneys can search across multiple files at once, saving considerable time over e-Transcripts in cases with high volumes of files.

So far Associated Reporters has converted all of their clients, except one. That one client still insists on getting e-Transcripts; however, with only one client seriously objecting, Associated Reporters has forged ahead with RB-PDF transcripts and has been able to significantly reduce the amount of time, money and errors previously incurred in preparing, distributing and archiving transcripts. And their production staff is very happy.

## Create RB-PDF transcripts

RB-PDF transcripts are simple to prepare. If you use RB Web, you can also automatically upload them to your clients' transcript repositories with a single click.

1. In **Production > Turn-in**, locate the job with an ASCII file you want to convert to a PDF transcript.

### RECOMMENDATIONS

To increase acceptance of RB-PDF transcripts, set their appearance to mimic the appearance of your current e-Transcripts.

For example, if you provide printed condensed transcripts:

- Expand the spacing between letters to make them easier to read.
- Set your printer properties to 4 sheets to a page, double-sided.
- Print out a full-size cover page and keyword index.

2. In the job's Turn-in window, select the witness whose transcript you are creating.
3. In the witness's detail window, click the **Witness-level Repository** tab, then click **New**.
4. In the New Upload window, click **Select Files**. Locate the page-image ASCII file, then enter file information.
5. Click **Save and Close**. The ASCII file uploads to the repository.
6. Select the ASCII file and click **Create PDF Transcript**. Then click **OK**.
7. Review the transcript and make any corrections, if needed. Then click **Save and Close**. RB8 converts the transcript.
8. When the conversion is finished, click **Archive to Repository**. Then click **Save and Close**. The converted PDF transcript uploads to the repository and is published, so that clients and reporters can access it on your RB Web.
9. Notify parties the transcript is available by clicking **Send Notifications**.

**NOTE**

Before creating PDF transcripts, set up your global preferences for how your PDF transcripts' appearance and options in **Tools > PDF Transcript Preferences**. You can override these preferences on an individual file in step 6 before clicking **OK**.

You can also print condensed PDF transcripts and create master word lists spanning multiple transcripts to distribute to reporters assigned to on-going cases. Refer to the *RB8 PDF Transcript Guide* for details.

**Axiom 5:**

**Outsource to improve profitability**

Outsourcing can be a good way to increase your business’s profitability when you hand off discrete business processes to specialists in those processes. It frees you and your staff to concentrate on the profit centers in your business – the areas where you are the specialists – and can help keep your overhead low, because you do not have to maintain staff, equipment and space for other processes.

You probably already outsource some business activities, such as delivering transcripts and preparing your tax returns. It’s a good idea to periodically examine your business and compare the costs of doing things in-house or by outsourcing.

Also, when you prepare to offer new services, you should “crunch the numbers” to see which processes it makes sense to outsource. For example, if you decide to offer online case repositories for large cases, you will be dealing with boxes and boxes of files to scan. This could be a prime example of a discrete business process to outsource. (See “Marketing: Provide online case repositories” for more information.)

Another time-consuming process that businesses often outsource is collections. However, traditional approaches to collections (such as sitting on an overdue invoice for months, then handing it over to a third party to deal with), are not as profitable as a combination of a consistent internal process, accurate account information and smart outsourcing. Use RB8 to help you improve your accounts receivable.

Outsourcing

***Reduce delinquent accounts***

One of the most effective ways of managing accounts receivable is to reduce the number of delinquent accounts. The key element required in accomplishing that goal is consistency. And consistency is built upon process. You should implement the following system to ensure that *you* are not the reason your clients are paying late:

**1. Decide up-front who gets credit and who doesn’t.** Make a decision on how you will be paid, *before* you make a sale. Will you always require payment in advance from out-of-town attorneys? Or, will you extend credit to some of them? If you’re going to extend credit, make sure you have some criteria in place to determine who gets the privilege of a loan. That’s right. When you extend credit, you’re actually providing an interest-free loan to your client. You need to develop a profile of the type of client that deserves such a loan, and *stick to it*. Use the **COD** checkbox and **Warning** in RB8’s **Firms** table to designate credit-risk clients.

**2. Never accept a verbal order.** Use a *Copy Order* form to get the copy request in writing. The form should clearly state your full terms and conditions including finance charges. Store signed order forms in the job-level repository for quick retrieval.

- 3. Send statements on a set schedule** – on the same day of each month. It is recommended to send out monthly statements around the 15<sup>th</sup> of each month, so that they will make into your clients' month-end bill paying cycle.
  
- 4. Routinely monitor your clients' payment habits.** Run the **Client Rating Report** in RB8 monthly. Look closely at the Payment History section to see if anything is sending up warning flags.
  
- 5. Immediately follow up on delinquencies.** It's a well known fact that the probability of collecting on a past due account drops *significantly* with the passage of time. If possible, contact the client as soon as the account goes past due to find out what happened. Ask for a specific date they will send payment. If they reply that "the check is in the mail," ask for the check number. You might also suggest that they send payment overnight, or offer to send a courier to pick up the payment. Their response to such suggestions will give you a good idea of how serious they are about paying. Record all conversations about a client's delinquencies in the **Collection Info** tab of their listing in RB8's **Firms** table.
  
- 6. Gradually increase the pressure for payment.** Prepare a set of letters that become increasingly firm (or phone scripts if you have the manpower to make personal calls). Send these letters out at regular intervals, every week or two weeks. The first letter might be a simple reminder of your terms and the missed due date, requesting them to contact you if there is an issue. The second might alert them to the overdue interest accruing (if you charge such interest), and suggest that you will not be able to provide further service until payment is made. The third or fourth should demand payment in full by a specific date, and outline what action you will take – for instance, placing the account with a collection agency -- if you do not hear from them. (Remember, if you threaten a specific action, you must follow-through, otherwise you will lose leverage and credibility.)
  
- 7. Consider outsourcing as an option.** Choose a reputable company that offers a low flat fee program for dealing with collections (around \$10 per invoice). Be proactive with problem accounts by transferring them to outside professionals at an early stage. Do not wait and hire a collection agency or attorney as a last resort if you hope to get paid.

## Axiom 6:

### Expand your company's reach through collaboration

Exchanging jobs with other litigation support agencies around the country and the world is a common way of providing clients with superior service and increasing their loyalty. Whether they have a need locally or in a place outside of your service area, they only have to call you, and you will arrange everything.

This kind of service is invaluable to your clients: you save them time looking for services in unfamiliar areas, and you reduce their anxiety about working with unknown professionals. As far as they are concerned, they are working with your firm.

So how do you find qualified services out-of-town? Many firms join networks, which is a good idea, although it can get expensive. With RB8, you can join the free RB XChange, which is open only to RB users.

In addition to free membership in a network with members across the U.S. and Canada, RB XChange users can share job data through RB8, eliminating re-keying, misspellings and lost information between firms. This saves both firms time and helps them present a professional image to clients.

#### Collaboration

### ***Exchange jobs with other RB users***

If you refer jobs to other court reporting firms or get job referrals yourself, you can save time and reduce errors when exchanging jobs with other firms who also use RB with RB XChange. The way it works is simple:

- **Sending an assignment:** If you have a job you want another firm to handle for you, you assign the job to them as you would assign a job to a resource. Then, with the click of a button, you create a file (in XML format) attached to the Reporter Worksheet that contains all of the job's RB data.
- **Receiving an assignment:** Firms which receive an RB XChange email with an XML attachment import the attachment into their RB calendar, using the **Import RBXChange File** function.
- **Turning in an assignment:** Firms can turn in jobs through RB Web the same way resources turn in jobs online. Information entered in RB Web imports directly into RB8, eliminating re-keying

#### NOTE

Because we value our clients' privacy, the RB XChange Job Exchange Group is strictly an opt-in list. It's free, but you have to join to be listed and to get access to the contact list of members. You can download the enrollment form by clicking the RB XChange button on our website.

Once your application is processed, we'll add you to the list and notify you. You can then access the list by clicking the RB XChange button and logging in with your user ID and password. The list is broken down by country, state and city. Individual firm information includes coverage area, complete contact information, and *MapQuest* directions to their office.

**Axiom 7:****Prepare for disasters**

Business owners, like Boy Scouts, should always be prepared. Of course you already have an automated back-up system in place for your files, preferably to an off-site location. And you have additional resources you can call on should an emergency arise with a scheduled reporter. You have liability insurance, health insurance, workers' comp, etc.

In short, you do what you can to mitigate the consequences of any foreseeable disaster. So what if a flood, fire, power outage or other disaster prevented you from getting to your office or accessing your company network? How would you take care of your clients? RB8 can help you with its Future Calendar function.

## Preparedness

***Email the future calendar to yourself***

If you cannot access RB for whatever reason, how would you contact your clients for tomorrow's jobs? Be prepared. Run the Calendar Printout report for future jobs every night before you go home. Then email the PDF version to your personal email account.

1. In **Calendar > Calendar Printout:**

- Select Yes in the **Future Calendar** drop-down.
- If you want details, select Yes in the **Show Detail** drop-down.

2. Click **Search**. RB8 lists all future jobs as a report.3. Click .4. In the Export dialog box, select MAPI in the **Destination** drop-down and click **OK**.5. In the Send Mail dialog box, enter your personal email account, then click **Send**.**NOTE**

The personal email account you use for this task should be independent of your office. In other words, it should not be a part of your office network or email system.

The content of this field guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by OMTI Inc. OMTI assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

ReporterBase, the ReporterBase logo, RB8, RB Web, and the ReporterBase 8 design are trademarks of OMTI Inc. in the United States and other countries.

For current information on ReporterBase software and services, visit [www.omti.com/rb](http://www.omti.com/rb).

© 2007-2013 OMTI Inc. All Rights Reserved.

**OMTI Inc.** • 3420 Bristol St., Suite 400, Costa Mesa, CA 92626

**Omi**  
DISCOVERY SERIES