

Client Case Study:

RDM Lawyers LLP

Discover how the corporate law department at this 50-year-old full-service law firm doubled their incorporations, increased productivity by 75%, and averted a staffing shortage with Appara.



RDM Lawyers

A Growing Full Service Firm for Corporate and Consumer Matters

Founded in 1971, RDM Lawyers is a full-service law firm based in Abbotsford, B.C. The firm serves the British Columbia market, with a special focus on the Fraser Valley. RDM Lawyers practice both consumer and corporate law, offering services in matters like adoption, immigration, commercial lending, personal injury, will and estate planning, employment and human rights, and business law.

RDM Lawyers regularly sponsor a variety of non-profit organizations. The firm supports the Reach Gallery Museum, a museum and art gallery dedicated to local Fraser Valley art and culture, and the Crystal Gala Foundation, which funds breast cancer research and treatment.

In 2021, RDM Lawyers celebrated its 50th year in business and hired its 100th employee. For Sheri Yakashiro, a partner at the firm who practices corporate law, and Heather Omelus, a paralegal who oversees staff in the corporate law department, this growth was encouraging, but it also created a variety of complications for the team.



“We’ve seen at least double the production on certain matters so far, if not quadruple.”

Sheri Yakashiro,
Partner & Corporate Lawyer

The Challenge:

Outdated Systems and a Tight Labour Market Constrained Growth and Productivity

RDM Lawyers were faced with a set of “good” problems: first and foremost, the firm was struggling to manage its robust growth and couldn’t find enough new hires to take on its rapidly-expanding workload.

RDM hired 40 new employees in 2021 and was looking at hiring additional scanning clerks and other support staff to clear document backlogs and handle administrative tasks for the firm’s lawyers. RDM was also running out of physical space to store its minute books, while the digital solutions the firm had implemented were inefficient and slow.

“We were using physical minute books,” Omelus says. “We were also spending a lot of time going through the document management process – saving documents from one system into another and then printing. We were getting into a situation where the staff were frustrated because they weren’t doing the kinds of work they enjoyed doing – they were doing a lot of administrative work instead of legal work.”

Omelus says the corporate law department’s prior records management process was hands-on, tedious, and required staff to frequently duplicate work. The paralegals would receive instructions from clients’ accountants, then walk downstairs to the firm’s first floor, find the relevant minute book, pull it off the shelf,

and sign it out. Before performing any maintenance work, the staff would need to review the minute book to ensure its current documents were accurate, and then prepare the documents using multiple different software suites.

Once the documents were prepared and printed for the lawyer to review, the team would need to either have the client come into the physical office to sign the documents, or upload the documents into a cloud-based document signing software and then manually insert signature blocks.

“Sometimes the signing software would crash,” Omelus says. “And with incorporations, half of the process would just be document management – printing the documents, scanning them, and preparing different packages for the bank, the accountant, and the client.”

Yakashiro says that when the COVID-19 pandemic hit, it became clear to the corporate law department that there had to be a better way of producing and managing documents. The pandemic opened the department’s eyes to the fact that digital solutions exist, and that the right digital tool could help their team save time.

The Solution

Appara Pro's Document Automation and Remote Collaboration Software

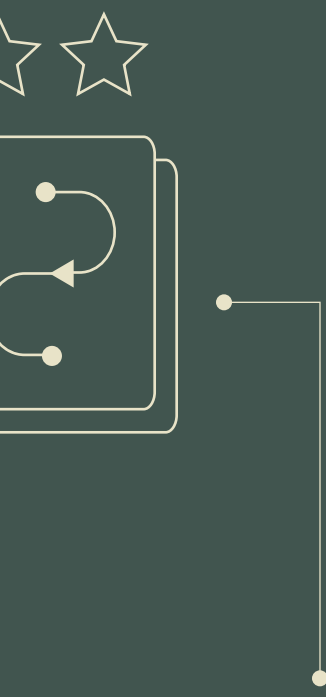
RDM Lawyers spent 10 years looking for a solution to the problems posed by physical minute books. First, the firm hired a scanning clerk, only to discover that there just weren't enough hours in the day to scan all of RDM's hardcopy documents into a digital system. RDM then tried to implement a mandatory scan policy for legal staff, but quickly found that with corporate lawyers and paralegals already at capacity with legal work, none of the legal staff had time to scan documents. Finally, RDM Lawyers spent five months trying to implement a virtual signing process with their existing document management provider, only for that effort to ultimately fail.

Yakashiro says the corporate law department decided to use Appara because the software automatically generates both the document and the index. She says that lawyers are always trying to find more hours in the day without extending the team, so automating the department's document creation was a significant time-saver.

"We weren't given any false notions," Yakashiro says. "We knew that Appara was still somewhat new. We were told that we'd be part of something that was still growing, and we were okay with that. We were happy to be part of the process."

Says Omelus: "Appara had created a program that tapped into the needs of corporate law firms. They seemed to know what they were doing. They had engaged other professionals who were in the industry, so that gave us a lot of confidence that they weren't just a tech company - they also understood the clientele."

Yakashiro says her biggest fear about switching to Appara was that her department wouldn't get the level of buy-in from staff needed to make the transition successful - though, over time the staff have grown to embrace the shift.



RDM's first year with Appara has been the corporate law department's highest-volume year on record.

“Some of our team had been using the same program for their entire careers,” she says. “My fear did come true in part, but even just last week I had one of our teams say they’re getting the hang of Appara. The problems we’ve encountered have mostly been differences in the form of precedent. We’ve noticed that the semantics, or sometimes the way the documents are prepared, is a little different from our precedents - but Appara has been great at tweaking what we need for our clients.”

Omelus says many of the department's remaining holdouts are now changing their minds and are adapting well to Appara.

“What surprised me the most,” Omelus says, “was the support from Appara. Their ability to answer questions and help us with issues. Even if the answer is already available on their website, they’ll still answer our questions. I’d score them 10 out of 10.”



Heather Omelus,
Paralegal & Corporate Department Head

“For the tasks that we like and use Appara for, we can accomplish in about ¼ of the time it would normally take.”

The Result

2X More Incorporations Per Month, Tasks Take 75% Less Time

RDM Lawyers' corporate law department is now at a point where the team feels familiar enough with the new system to implement Appara across the board. "Everyone [in our department] is using it regularly; everyone has done at least a handful of projects through Appara," Yakashiro says.

The department currently has approximately 20 paralegals & support staff and 10 lawyers using Appara. Their document management process is now about 60% virtual. Some of RDM Lawyers' more traditional clients still prefer to come on-site to sign hardcopy documents in person, but the department is no longer sending out packages in the mail – and by and large, their clients say the new system offers a much better experience.

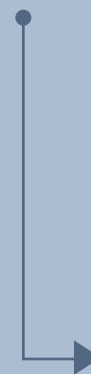
RDM Lawyers' corporate law department uses Appara for general corporate tasks such as incorporations, annual maintenance, and change of registered and records office, as well as more complicated matters like tax transactions, rollovers, amalgamations, and dissolutions. The department is finding that these tasks now take significantly less time than they did in the past.

"Updating our precedents is going to be a yearlong process," Omelus says, "but the tasks that we like and use Appara for, we can accomplish in about $\frac{1}{4}$ of the time it would normally take. We've been using Appara for 4 months, and we're now able to incorporate 20 companies in the same amount of time it previously took to incorporate 10."

Yakashiro says that while there are still some hiccups, the volume of work her department has done in the first 11 months of 2021 has surpassed any prior year.



"We've been using Appara for 4 months, and we're now able to incorporate 20 companies in the same amount of time it previously took to incorporate 10."



She says Appara has helped to alleviate some of the added pressure of the extra volume, enabling the department to accommodate the additional workload without relying solely on hiring new staff. “It’s hard to find new hires,” Yakashiro says. “We’ve hired 40 people this year, and they haven’t been easy finds. A lot of them have taken time and many failed attempts, so finding efficiencies anywhere we can is important. Finding new ways to take admin work off the lawyers’ desks has been a huge saving grace for our corporate team.”

Yakashiro says the biggest change she has noticed since implementing Appara’s software is that she is now becoming the bottleneck in her department. Before Appara, she would often need to wait for her team to draft and send her documents for review. Now, she has an inbox full of electronically-prepared documents, which indicates her department is processing a higher volume of work.

"It's encouraging to already see that return on investment in such a short period of time"

“We’re now spending less time on administrative matters than on the legal work we’ve been hired to do. We’ve seen at least double the production on certain matters so far, if not quadruple. It’s still early, but it’s encouraging to already see that return on investment in such a short period of time.”

For Omelus, the ability to have clients sign annual reports digitally saves a significant amount of time by eliminating the need to follow up on paper documents.

RDM Lawyers is currently working on plans for future growth. Yakashiro says the firm has outgrown their physical office space as well as several legacy software tools.

“The other legal software programs we use don’t really talk to each other; each one works in its own little realm. The program we were using prior to Appara is one that’s been around for a long time, and with that prior program we still have to upload and duplicate a lot of that information into a separate system to address conflicts with other matters. We’ve been with our existing primary legal program for 20 years; that program has a number of challenges, and we’re looking at moving away from it at some point.”

Omelus says she’s excited by the possibilities that Appara has opened for the firm, and RDM Lawyers is eager to continue optimizing its processes and finding efficiencies through Appara’s AI document automation and records management software. The firm is now starting to imagine what further digitization could look like and how other emerging technologies can transform their practice.

Appara

One Platform for Everything a Law Firm Does

Appara was created by lawyers, for lawyers

As practicing lawyers, our founders saw firsthand how a lack of advanced technology was hindering our growth. We were frustrated with the state of legal technology, and we were tired of repeating work in multiple places.

What our firms needed was a records management tool with a built-in AI that could auto-generate documents and help us streamline our records management processes - but the solution we wanted didn't exist. So we built it, and we called it Appara.

Discover how effortless records management can be.

Contact **sales@appara.ai** to learn how your firm can save time and boost productivity with Appara

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