

# THE CASE STUDY FOR OPTIMISM

NATASHA RAWLEY, THE FILE QUEEN

Happy 2018, LPM readers. Sorry it's slightly belated – most of you will have settled nicely at your desks and be planning away for this year's projects by now. And I suspect many of those will involve the EU's General Data Protection Regulation, that new legislation we've all been tittering about for over two years, which will be enforced in just over three months.

So, I thought I'd kick this issue off by sharing some details of our clients' projects that have been part of their GDPR prep – hopefully it will give you some insight into small internal changes that can be made to help compliance.

One of our law firm clients moved offices in late 2017 and decided to use the move as a catalyst for process changes needed to comply with the GDPR.

How did they do this, I hear you ask? The firm started with a monthly hardcopy file amnesty five months before the move. Fee earners, partners and PAs were assigned a date on the first week of every month to hand over old or hidden files from under desks and secret storage cabinets – with no questions asked or hard slaps on the wrists.

Those files were then barcoded, registered and archived. Not only did the firm locate historically missing files by doing this, but those files could also be tracked – giving all files an audit trail. GDPR triple tick!

Lurking, recalled files and old files that had been recalled some time ago were also handed over during the monthly file amnesty, which meant they could be reviewed by fee earners right away.

If the files were past their retention period, the firm reviewed them, updated the system and sent them back to archive storage on a destruction instruction – full audit trail and secure destruction completed and documented.

Office space freedom was another challenge that helped the process of GDPR compliance along. This particular practice moved to an office space that had a third of the space of their previous residence – so, not only did they not have space for storage of historical files, they also had no room for all the unclosed files in the office.

This was the practice manager's chance to shine – and get the paper-light process (which had been waiting for a while to be implemented) moving. Open files were barcoded, registered and sent offsite for scanning, and during the moving period and after fee earners were given consistent access to these files in electronic format.

It was an adjustment for the fee earners but it pushed a new process. And it was a GDPR win because the documents were more secure offsite and had full audit trails, and files were hosted on a secure, encrypted EDRM (electronic document and records management) system for access instead of being transported by fee earners in hard copy.

Next month I'll be back with more insight into law firm GDPR projects, so watch this space. Alternatively, please come by the ADDS stand at the LPM London conference on 6 February if you're there and I'll be happy to tell you more in person. [LPM](#)



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## ABOUT

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5. Each file is barcoded and indexed.



6. Then stored safely and securely.



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