



## Daptiv PPM Helps Streamline Processes for IKON Office Solutions

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John Vaccarello, National Director of Litovation Operations for IKON

### AT A GLANCE

- The need for a PPM System at IKON became apparent when Legal Document Services changed its project management model from a regional management structure to a national management structure.
- Daptiv PPM offered the flexibility and configurability to meet the specific needs of the legal industry and IKON Legal Document Services.
- IKON has achieved a new level of accountability through Daptiv PPM.
- We have improved our service levels and response times dramatically with the implementation of Daptiv PPM,” said Vaccarello.

IKON Office Solutions, Inc., a Ricoh company, is a leading provider of innovative document management systems and services, enabling customers to improve document workflow and increase efficiency. Through its Legal Document Services offering supported by a large national network of processing centers, IKON provides law firms and corporate counsel with a comprehensive suite of document services including imaging, processing work, electronic discovery, data forensics, records management, and other litigation support services.

### BUSINESS ISSUE

The need for a Project Portfolio Management (PPM) System at IKON became readily apparent when Legal Document Services changed its project management model from a regional management structure to a national management structure. Previously, they had relied on productivity tools such as Microsoft Excel or Access to manage projects. With the shift to a national managed workflow, these tools quickly

proved insufficient given IKON’s need to both plan and monitor at a national level while executing at the local level. They lacked the ability for team members to collaborate, get status updates, effectively utilize resources, and share and capture knowledge. Further, given the vast amount of documents based on the number of cases they dealt with in the legal services industry, this approach required huge investments in time involving manual updates and reconciliation of several disparate documents across offices.

IKON sought a solution that would allow team members to better track customer projects and serve as a communications tool that would streamline the management and coordination of those projects across multiple offices nationally. “We needed a holistic, multi-faceted solution to help organize projects, assist with assessing client needs, monitor current resources and effectively deploy resources as needed,” said John Vaccarello, National Director of Litovation Operations for IKON.



## SOLUTION—COMPREHENSIVE PROJECT MANAGEMENT TAILORED FOR THE LEGAL INDUSTRY

IKON needed a PPM solution with the following capabilities:

- Easy to configure to match IKON's business process
- Small footprint with little to no IT overhead or dependency
- Ability to create templates to ensure repeatability of best practices/processes

Vaccarello and his team chose Daptiv PPM as a way to achieve these objectives. Daptiv PPM offered the flexibility and configurability to meet the specific needs of the legal industry and IKON Legal Document Services. Under the guidance of experienced Daptiv solutions consultants, IKON picked the individual components that would best serve its needs, with the option to introduce newer capabilities as requirements changed. In addition to giving IKON Legal Document Services a core set of best in class PPM capabilities such as project and resource management, Daptiv also provided document management solutions; coupled with configurability and robust reporting. Together, these components added up to more than just a project portfolio management system—IKON received a comprehensive business/operations management solution.

Vaccarello started deploying Daptiv by creating project request forms specific to different areas within his division such as Litigation Support and Document Processing solutions. Project requests were entered using customized templates that promoted regular, consistent use of the software for project management and communications. Having the flexibility to customize project templates and project views dramatically streamlined and added accountability into IKON's process. "We

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Vaccarello

handle a significant amount of projects every month. Without the ability to pre-build templates with people, tasks and specific Dynamic Applications, we would have had difficulty handling this volume," said Vaccarello.

With Daptiv, IKON was able to streamline its entire document management process, from project bidding and on-boarding through completion. "Daptiv PPM has allowed our organization to react more quickly and become a more agile organization. This agility has allowed us to tackle large projects in a comprehensive and nimble manner, leading to improved efficiency and improved customer service," Vaccarello stated.

## VALUE ON DEMAND—SAAS SEALS THE DEAL

Like most legal services companies, IKON is not an expert in project management software development and maintenance. With a SaaS-based solution they didn't need to be because Daptiv hosts the software. Security and software updates happen automatically and regularly.

Daptiv passed IKON's stringent security requirements, and the SaaS deployment allows IKON to concentrate on its core business, satisfying the critical processing needs of corporations and law firms.

With Daptiv PPM, IKON Legal Document Services now has a holistic, real-time view of their entire project workflow across all offices as well as drilling into the progress made on each individual project. "Our teams embraced Daptiv PPM very quickly as a welcome reprieve from the previous approach to managing our project workflow on a national and regional level," said Vaccarello. "Document management is the lifeblood of the legal industry and we've built a business around helping law firms manage this costly and complex

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IKON also made effective use of Daptiv’s Dynamic Applications™ capabilities, creating a number of custom applications which have proven to be highly valuable for tracking specific sub-processes within projects or managing service-related information. Automatic notifications allow project managers to worry less about who they need to e-mail for status updates by making sure everyone gets the information they need in a timely manner. IKON has a historical record of projects and can refer back to them for additional enterprise intelligence needs, strengthening its overall processes. “Project managers work on cases across the country where the status is constantly in flux, and our projects often move very quickly. Being able to marshal the resources of our entire organization using a single point of access for the entire team is a great resource,” said Vaccarello.

Another benefit of Daptiv PPM is the reporting and productivity tracking. IKON has achieved a new level of accountability within the division through Daptiv PPM because team members now have a tool

to not only assign projects to individuals, but also track their progress and quality of work provided. Vaccarello stated, “We have dramatically increased our collaboration across departments as well as offices because Daptiv PPM enables our staff to understand the context of their individual projects as it relates to the needs and deadlines of others, which allows us to more effectively manage the resources needed for each project at any given time.”

With the intelligence offered from Daptiv’s Work Intelligence reports and dashboards, IKON can allocate resources differently, refocus training efforts and change its workflow model based on the information available. The management team uses Daptiv’s reports to direct workflow and manage project billables, and IKON’s end-users utilize the highly-customizable dashboards to access their most commonly used resources. “Daptiv PPM has proved to be the central framework that has helped transition us from a site-focused organization to a national network of processing centers. We have improved our service levels and response times dramatically with the implementation of Daptiv PPM.,” said Vaccarello.

## ABOUT DAPTIV

Founded in 1997, Daptiv is the leading provider of on-demand Project Portfolio Management (PPM) solutions. Daptiv has helped thousands of companies improve their strategic planning and business execution by offering adaptable PPM solutions and expert professional services. Daptiv’s customers include world-class organizations such as Beam, Chase, Coach, Harvard University, Honeywell, InterContinental Hotels Group, and Virgin Australia. For more information about Daptiv’s PPM solutions, please visit [www.daptiv.com](http://www.daptiv.com).

