

Outsourcing Your Legal Document Transcription

Working Smarter in Today's Economy (Part 2)

By Richard Jackson

Last month, I wrote about why outsourcing document transcription is a wise choice for today's lawyer. I covered what outsourcing is, how it helps save time and cut costs, and how it enables attorneys to be more productive.¹ This month, I discuss choosing a transcription provider.

What to Look For in a Transcription Provider

The following are key considerations when choosing a transcription provider.

Turnaround Time

Turnaround time for completed transcription work ranges from 3 hours to 24 hours and longer. Since many legal documents are time sensitive, your provider must be able to consistently deliver the completed dictation promptly. Use the following tips to ensure providers can meet your needs.

- Confirm you can contractually obligate a specific average monthly turnaround time so you are assured providers will consistently comply with your requirements.
- Ask whether there are additional charges for faster turnaround times. For example, providers may state they offer same-day turnaround, but their standard rate may

be based on a 24-hour turnaround. You may be charged additional fees for the faster time.

- Since some larger law firms often work around the clock, make sure providers can process your transcription jobs 24 hours a day, 365 days a year so you don't incur lengthy delays during off hours.
- Check references to ensure providers have delivered transcriptions for other firms or large user groups in the required turnaround times.

Confidentiality and Security

Use the following points to explore the extent of a provider's ability to protect your firm's confidential material.

- Find out if the provider's typists work for an outsourced offshore company. Using offshore typists makes it difficult for a provider to enforce confidentiality and security provisions in written agreements.
- A provider should be able to present you with a written plan showing how it keeps records confidential and addresses HIPAA regulations.
- Find out if the provider requires employment history and criminal background checks for its typists and whether the typists sign confidentiality agreements.
- Determine if the provider's typists are geographically dispersed or work together in a single location. If they work together, inquire about safeguards to prevent sharing of confidential information among typists.
- Ask how the provider assigns transcription jobs. Random assignment is best to keep typists from viewing multiple files from the same case.
- Determine whether the provider can retain and destroy your firm's dictations

and completed documents to meet your specific needs.

- Ask about technical security options such as SSL, VPN, and encryption. Make sure the provider will work with you to offer the most secure solution compatible with your firm's technology and requirements.

Capacity

There are many local voice transcription services with a small number of typists who can produce a limited amount of work. Ask potential transcription service providers whether they have the capacity to meet your firm's demands.

Estimate the number of documents you produce and the calls your staff will make in a given period and make sure providers can meet your needs. Check references to ensure providers have met the needs of similarly sized firms in the past.

Legal Experience

Ask for references from other law firms to ensure potential providers use typists with experience producing legal documents. Working with a provider whose typists are familiar with legal terminology and formatting and the confidential nature of the material is helpful.

Call-in Number for Recording Dictations

Look for providers offering 1-800, 1-888, or similar call-in numbers you can use to record dictations 24 hours a day. This allows users to call from their mobile phones following client visits or any time and place they have access to a telephone.

Other Ways to Send Your Documentation for Transcription

A benefit of using outsourced transcription is increasing your staff's options

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for recording and inputting material. Consider the ways your staff prefers to work. Do they regularly produce documents after hours? Do some work from home? Does your firm use dictation devices? Ask providers if they offer multiple methods for your staff to input material—by toll-free telephone dictation, smartphone apps, upload from dictation devices, directly into mobile computers via a microphone, or directly into desktop computers. The more ways a provider accepts transcription materials, the more effective the service will be.

Mobile Device Capabilities

Many attorneys use mobile devices such as laptops, tablets, and personal digital assistants while they are away from the office. Look for providers with the ability to send and receive jobs via mobile devices.

Start-up Process and Costs

The start-up process should be well planned, streamlined, and free. Before you choose a provider, ask the following questions:

- Does the provider require a contract?
- Does the provider require a minimum number of jobs?
- Are there fees associated with additional features or software, implementation support during the start-up period, or customer service?
- Will the provider establish my accounts or is my firm responsible for setting up accounts?
- What type of training and support will I receive as my users get started with the service?
- What type of billing and usage reporting is provided? Will I pay extra for reports?

Training

The service should be easy to use and offer online tutorials or other support tools and job aids.

Customer Service

Ask about the type and extent of customer service. For example, ask if users can

talk to a customer service representative when needed and whether your firm will have an assigned account representative to contact for questions and support.

Formatting Flexibility

Make sure providers can adjust the layout, font size, margins, and other document characteristics to meet your specific needs. Some companies provide only a standard format, which creates more work later if you need to edit documents.

Additional Tools

This article addresses the basic functions of transcription—dictating and typing. However, a company with a robust transcription solution can provide additional tools and benefits. Be sure to ask if there are additional features you can use to increase your staff's productivity. Examples include incorporating client-provided templates, training tools, websites, access to past dictations, and usage reports.

A Note About Voice-Recognition Technology

To save money, some organizations opt to install voice-recognition software on individual computers or mobile devices instead of using a third-party transcription provider. However, voice-recognition software can be particularly challenging and time consuming to install, learn, and use. Using a transcription service's typists to interpret and type documentation is generally preferred for the following reasons:

- Typists listen to and execute specific instructions. For example, an attorney can instruct the typist to format a document a certain way, such as "Bold the following sentence" or "Please use bullets for the following points." Other examples include spelling out acronyms, using specific addresses, or requesting a copy of the notes be sent to a supervising attorney. In addition to instructions, typists can make corrections requested during dictation. The ability to interpret verbal instructions provides more flexibility and limits the amount of editing the final document requires.

- Typists can filter out "ahs" and "ums" and other extraneous words.
- Voice recognition requires users to dictate in an environment with little or no background noise or to purchase a special, sometimes expensive, microphone to filter out extraneous sounds. Typists are less sensitive to background noise, leading to a more accurate final document.
- Learning to use voice-recognition software takes time. Outsourced transcription can be used immediately with little or no training time.

Conclusion

In conclusion, outsourcing your document transcription is a quick and effective way to reduce your firm's administrative overhead and increase individual productivity among associates and partners. I recommend choosing a 24/7 transcription company with a large staff of trained legal typists, quick turnaround, no minimums, and no contracts. By outsourcing, you'll be working smarter and faster while improving your bottom line. ■

A version of this article appeared at www.speakwrite.com.



Richard Jackson is president and CEO of SpeakWrite, a 24/7 transcription company with trained legal typists. SpeakWrite's product suite includes Voice to Document, human-powered transcription services that deliver

audio-to-document around the clock; SpeakWrite Mobile, for the generation and delivery of dictation and images via smartphone; and SpeakWrite WorkFlow, a digital dictation management tool to increase productivity and simplify management of teams and projects. Find more information at www.speakwrite.com.

ENDNOTE

1. For questions regarding the ethical implications of outsourcing, contact the State Bar of Michigan's Ethics Helpline at (877) 558-4760.