

Facts

Factual information about the target client



Equipment & Environment

- DM400 postage meter. Located in “mailroom” – small closet accessible to everyone in the office.
- Uses PC, fax machine, networked printers.
- Office is slow to adopt new technologies
- Jill’s kids recently bought her her first smartphone. She does not use it for work-related activities.
- Jill’s desk space is limited.

Responsibilities

- Legal Admin
- Orders supplies
- Jill works in one of the two firm’s offices
- One of several meter operators (10% of her time “sending”)

Attitudes

- Risk-averse worldview. Change = Risk
- To accept change, it must have significant, meaningful upside with little perceived downside.
- Trust with the carrier, and general feeling of confidence, is very important to her

Behavior

Existing behavior now because they don’t have our solution

Mailing

- *Where:* Postage meter in central location (mailroom)
- *Who:* Jill and other paralegals in the office (decentralized) (as well as paralegals in the other office)
- *Volume:* 1-5 items per day (for each paralegal). Mostly mail and large envelopes with documents, occasionally flat rate boxes
- *Contents:* Documents (only). Transactional, regulatory purposes.
- *Services used:* First class, Priority flat-rate, Certified return/receipt or Signature Confirmation (often needs proof of delivery)
- *Cadence:* Create mail & print postage on a 1-off basis.

Shipping

- *Where:* Decentralized – Jill’s desk (manual carrier forms) and other’s desks
- *Who:* Jill and other office staff (distributed)
- *Volume:* Same as above (mail & ship are not different)
- *Contents:* Documents (only). Transactional, regulatory purposes.
- *Carriers used:* Use USPS for all firm mailings and day-to-day correspondence as well as any lower-priority/lower-risk legal documents. Also uses FedEx, UPS and local couriers in a normal week. Manages multiple accounts and keeps track of it in her head. Sometimes has to check in a couple of places to find tracking data; normally 5-10 shipments outstanding at any given time.
- *Services used:* 2-day and overnight.
- *Cadence:* Gets many request for shipments throughout the day. Lawyers and other staff say "Hey, will you send this document to this client (matter # XXXXX), and make sure it gets there no later than the day after tomorrow?" She prints shipping labels as the need arises. Take items to drop-box before pickup time.

Overall

- *Criticality of items:* Business-critical. Documents sent are very important to the firm and clients; most materials are time-sensitive.
- *Destination of items:* Ship between offices (same City) and Regional. Some Domestic. No International mail.
- *Who pays for shipping:* Clients. Postage/shipping charged back to clients. Exceptions are extremely large clients for whom postage/shipping is a laughably small percent of their value to the law firm. Sometimes she can bill the shipping directly to the client’s carrier account; otherwise she uses a company card to pay.
- *Perception of packaging:* Appearance of packaging matters – the firm feels that the appearance of packaging represents their brand as a high-quality, sought-after law firm.
- *Decision-making:* Regular transactional items go USPS, critical or urgent items go FedEx unless certified/RR is needed. Jill decides which carrier & how to send. Always chooses FedEx if it’s critical because she trusts them most.
- Time and confidence are the most important factors. Mainly uses Overnight or same day if urgent. When deciding between FedEx & UPS, cost becomes the more important factor.
- Sends many documents requiring signature and return, so she often creates return labels at the same time of printing shipping label.
- *Packaging:* Uses a lot of the same packaging, but with a different weight each time
- *Package prep & Addresses:* She prepares and addresses her own items. Addresses come from CMS. Sends items between offices and to same clients, so often needs to recall previously-used address.

Pain & Needs

Client problems that we believe our solution solves

Mailing

- Even thought the cost is passed to the client, she does not use accounting when sending. The chargeback process is cumbersome and time-consuming.
- Meter is large for their small space and the office staff constantly wish it could be smaller. When their lease expires they are considering moving to a smaller meter, both for a better price and a smaller footprint.
- Meter does sometimes break, and it’s a big pain point until it can be fixed.

Shipping

- Complexity of carriers
- Lack of efficiency caused by managing many carriers
- Limited knowledge
- Tracking of documents, time stamps on sending, receipt and delivery are important; People are always asking her "where is that document?" Needs to have real-time tracking information and be informed immediately if/when there is a problem. Currently she has to check on critical items manually until they arrive.
- Needs to maintain a separate address history with each carrier – this means she’ll eventually have to type each client address into both UPS.com and FedEx.com
- Today she has to walk over to the networked printer in her office to pick up printed shipping labels. She’d love to have a printer on her desk instead, but she doesn’t think the firm would pay for that, and she doesn’t have room anyway.
- Uses a lot of the same packaging, but with a different weight each time, so she needs to use scale. Sometimes the item is too heavy for the DM400’s scale. In that case she just guesses (for UPS and FedEx). She doesn’t know whether they get charged extra for that, but it doesn’t bother her too much because the client is going to pay for it (not the firm).

Overall

- Data management: It is critical to tie every single shipment to a specific client and case by referring to the "matter number". They have thousands of these, because every client activity gets a new number. They need to be able to get this data into their accounting system when they are done. It can be tedious and error-prone.

Goals

Goals implied by their behavior that this solution will better support

- Accuracy, precision, and dependability are most important to Jill - “The most important thing is that we know it’s gonna get there when it’s supposed to, and usually we need to have proof of that. And we need to trust that’s gonna happen. How much it costs is just not that important when you’re talking about the kinds of things we’re sending.”
- Simplicity of experience matters - “There are only a few [carrier] services we use because we’re used to them and we know how they work. And we just don’t have the time or expertise to go looking around for different ways of doing things. I don’t know if we’re doing things the best way, but it’s working so we keep doing it.”
- Memo field and cost accounts will help her keep track of who sent what and where it was billed
- One place to view all outstanding shipments; great recordkeeping of what was sent to whom on what day