

The one software tool that virtually every legal consultant says you must have in order to effectively manage your practice is a case management system (CMS). Yet the annual ABA technology survey shows that only 53% of their respondents actually have a CMS and only 36% report actually using it. And shockingly, the number one CMS program used according to the survey is Microsoft Outlook, with a whopping 51% response rate. Time Matters came in a distant second at 12% just barely edging CaseMap, another non-traditional choice, at 11%

So the first question is obviously, why are consultants so sure you need a CMS? Andy Adkins, director of the Legal Technology Institute at the University of Florida Levin College of Law has been a CMS consultant for nearly twenty years and is an acknowledged expert in the field. Andy is on record as saying that basic CMS functionality comes down to several fundamental tasks which are best handled by one application, including:

- **Calendaring System:** A good calendar system allows you to define a set of “rules” based on a key date, such as a trial or motion.
- **Contact Database:** An electronic Rolodex for entering basic contact information and notes about clients and other parties.
- **Case Database :** storage for all information about the case or matter which can link to the contacts and avoid double entry of data.
- **Case Notes or Diary:** contains free form information about the case which allows a centralized case information store for anyone to access.
- **Document Assembly:** merges the information in the other modules directly into your word processor and integrates with your document management system
- **Reports Writer:** either customized or standard regular reports.

So if all the experts agree that one program can integrate all these separate tasks, why don't more firms have a CMS? I've had a unique opportunity to answer that question here in New Orleans with the Gulf Coast Legal Technology Center (GLTC), a joint project of my non-profit organization and Law Office Technology (LOT), a Baton Rouge based consulting company specializing in CMS installations. For the past year, the GLTC has been working in the Gulf Coast to help small and medium sized firms get back on their feet and literally rebuild their office from the ground up. (yes I know it's been two years since the storms, but believe me, the recovery rate here has been terribly slow, for a variety of reason which I have neither the time nor the restraint to go into here)

What we have found is that most firms have been using separate applications to perform the functions Andy listed and they hadn't wanted to take the time to “unlearn” their existing workflow. In addition, the common impression about CMS is that it is difficult to implement and too expensive for all but the big firms. But now that they are upgrading or replacing their systems, they consistently ask “What is the right technology to equip a new law office or to upgrade and replace existing equipment and software? “

Our answer is that you need four fundamental pieces: new hardware, word processing, an email system, and case management. The cornerstone is Microsoft® Windows® Small Business Server. As Craig Bayer, the principal of LOT, puts it, “ *The Small Business Server is a giant killer. It allows you to host your own email, contains a fax server and gives you SharePoint, the Microsoft web-based collaboration and document management platform , which also allows remote access from anywhere.*”

This approach allows a centralized approach to the firm’s software which makes the use of a CMS extremely easy AND cost effective. Craig explains that “*Purchasing a Quad Core Xeon Processor Server with 4gbs of Ram, 3 160GB hard drives in a Raid 5 Configuration and Small Business Server 2003 instantly allows small firms to level the playing field against their larger competitors, for only \$2000. in the country. Their largest expense will be training the staff on how to use all the technologies.*”

Does this seem fanciful? Well consider the experience of Murray, Darnell & Associates, a well known two attorney firm in New Orleans. (Michael Darnell was a partner at the law firm of Adams & Reese through 1995 and has been an Assistant District Attorney, Assistant City Attorney and Judge Pro Tempore. Edwin Murray is a former member of the Louisiana House of Representatives and current member of the Louisiana State Senate.) The firm already owned Time Matters and PCLaw but felt they weren’t maximizing the effectiveness use of these applications. The solution was to install MSBS with four new desktop PC’s, add several ScanScap scanners and then upgrade all of their software.

The cost of this installation came to just over \$10,000. Installation, upgrades and training added another \$3000. The result was that for roughly \$14,000, the firm was able to integrate all their workflow and implement their CMS in a way which allows them to effectively manage all their information. The key is getting the right combination of hardware and software so that the CMS is maximizing efficiency. The good news is that such a solution is readily available at a reasonable price.