



# Why Are Consultants So Sure You Need a Practice/Case Management System?

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Lexis-Nexis Webinar  
April 29, 2008



# WHY YOU NEED IT

- Virtually every legal consultant says you **MUST** have a CMS in order to effectively manage your practice
- Andy Adkins
  - One application is more effective way to handle multiple tasks
- Tom O'Connor
  - Part of overall technology strategy



# WHY YOU DON'T HAVE IT

- Using separate applications
- Don't want to take the time to "unlearn" existing workflow.
- Common impression about CMS is that it is
  - Too difficult to implement
  - Too expensive for all but the big firms
- Many attorneys think they DO have a CMS



# WHY YOU DON'T HAVE IT

- ABA technology survey shows that only 53% of respondents have a CMS
  - only 36% report actually using it
  - 51% use Microsoft Outlook
  - Time Matters at 12%
  - CaseMap at 11%
- What is CMS?
  - Case Management
  - Practice Management



# CASE MANAGEMENT

- Manage Specific Cases
  - Track specific case information
  - Often litigation specific
- Matter Management
  - Transactional attorneys
  - Document assembly
- Financial Management Systems
- Document Management Systems



# ADKINS REQUIREMENTS

- **Calendaring System**
- **Contact Database**
- **Case Notes or Diary**
- **Document Assembly**
- **Reports Writer**



# PRACTICE MANAGEMENT

- Includes:
  - Case Management
  - Document Management
  - Financial Management
- Features
  - Encompass workflow
  - Centralized information storage
  - Multi-user access
  - "Cafeteria" approach



# TOP REASONS TO USE

- Common Interface
- Organized by client/matter number
- Share everything
- Do quick conflict checking
- Record and link phone calls
  - No lost pink slips
- Small firm version of KM
  
- CLIENT EXPECTATIONS



# FURTHER REASONS

- **Combines**
  - calendaring/ tickler functions
  - docketing
  - case information tracking
  - address book functionality
  - document assembly capabilities
- **Portability**
  - Laptops
  - PDA's
- **Avoid malpractice**
- **Turn wasted time into billable time**



# OBLIGATORY ED REFERENCE

- CMS background in litigation
- Growing emphasis on ED
- Huge amount of data
  - Even in small cases
  - Average hard drive is 60GB
  - E-Mail
  - Family Law, Criminal, Bankruptcy
- You **MUST** have computerized control of this data



# O'CONNOR ANALYSIS

- Four fundamental pieces of law office technology
  - Hardware
  - Word processing
  - Email system
  - Practice management
    - CMS
    - T&B
    - DMS



# THE \$10,000 LAW OFFICE Hardware

- ▶ **Computers**
- ▶ **Windows Small Business Server**
- ▶ **Scanner**
- ▶ **Network Printer**
- ▶ **Gigabit Switch**
- ▶ **Firewall**
- ▶ **Backup System**
- ▶ **Electrical Protection Systems**



# The \$10,000 LAW OFFICE: Software

- ▶ **Word Processing**
- ▶ **Adobe Acrobat/ PDF writer**
- ▶ **Billing/accounting software**
- ▶ **Case management system**
- ▶ **Document management system**
- ▶ **E-mail software**
- ▶ **Internet access (for research)**
- ▶ **Utilities**
  - ▶ **Data backup**
  - ▶ **Security**
  - ▶ **Anti- virus software**





# SELECTION PROCESS

- Workflow
- Customizable forms
- Sync with handhelds
- T&B
  - Merge
  - Share
- Import old data
- Support
- TRAINING



# TRAINING

- **TOP TRAINING TIPS**
  - **TASK-ORIENTED not FEATURE-ORIENTED**
  - **NO GENERIC TRAINING**
  - **PROFESSIONAL TRAINERS**
  - **TRAIN OFTEN, TRAIN GENTLY**
  - **MAKE TRAINING MANDATORY**
  - **LIVE IS ALWAYS BETTER, BUT IF NOT TRAIN ONLINE**
  - **THE TRAINER'S PHYSICAL LOCATION IS IRRELEVANT**





# SAVINGS

- If CMS saves you 15 minutes per day
  - Bill 15 minutes more per day
  - @ \$300/hour
- \$75/day
  - \$375/week
  - \$1500/month
  - \$18,000 year
- Don't forget to add impact from billable staff as well



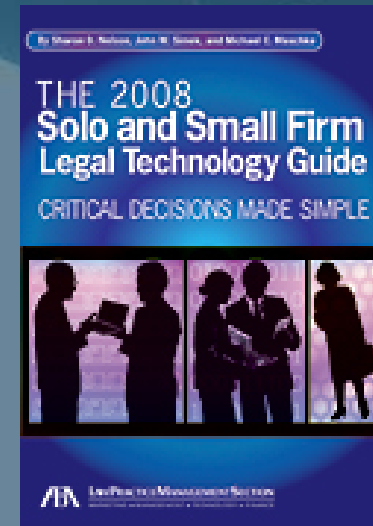
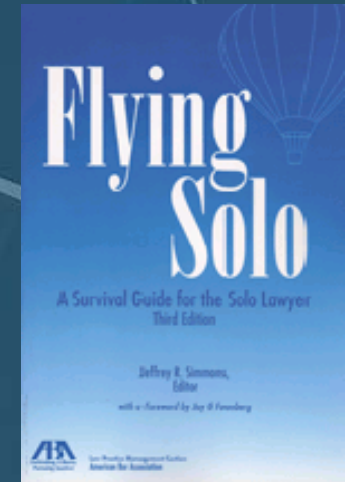
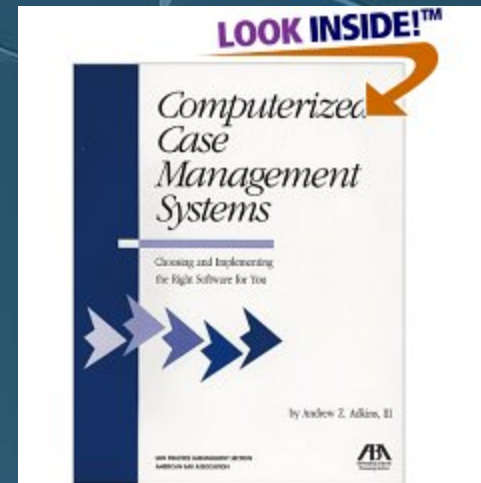
# EXAMPLE

- Murray Darnell
  - Already owned Time Matters and PCLaw
  - Felt they weren't maximizing the effectiveness use of these applications
- Install new hardware
  - MSBS
  - 4 new desktop PC's
  - ScanScap scanners
- Upgrade all of their software
- Total cost
  - Equipment just over \$10,000
  - Installation, upgrades and training \$3000.



# ESSENTIAL BOOKS

- Computerized Case Management Systems – Andy Adkins
- 2008 Solo & Small Firm Legal Technology Guide – Nelson, Simek & Maschke
- How to Start and Build a Law Practice by Jay Foonberg
- Flying Solo – Bill Gibson





# Thank You For Listening!

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