



# Systems to Increase Productivity

Presented by:

Gail Bailey

# Do These Describe You?

- Scattered
- Disorganized
- Overworked
- Buried under a stack of papers



# Would You Like These to Describe You?

- Maintain electronic files
- Have information at your fingertips
- Access files from any location



# Case Management and Billing Systems

- ProLaw
- Tabs3
- PracticeMaster
- Needles
- Time Matters
- PCLAW
- Abacus Law
- Amicus Attorney
- Perfect Law
- Billing Matters

# Things to Consider

- Area of law
- Number of users
- Your use of the product
- Amount of training required
- Where you will obtain training
- IT support

# ProLaw

**New Matter**

File Edit View Tools Actions Help

Matter ID:  Desc.:

Client Sort:

General Notes Billing Related Contacts Related Matters Events Inquiry Settlement

Company:  Class:

Full name:  Phone:

Notes:  Address:

Client  Billing  %  CC

Client Correspondence  
 Addr.  CC  BC  None

Area of Law:  Assigned Type:  Initials:  Professional:  Percent:

Type:

Opened:  8/24/2007

Status:  Pending  8/24/2007

<No data to display>

# Flexibility

- Plan ahead
- Remember things always change
- Make sure your system will grow with you and allows for change

# Security and Disaster Recovery

- Make sure your plan actually works!
- Server IP not viewable to public
- Terminated employee account is made inactive
- Evaluate the number of hours billed per day by the firm and the money associated with those hours – that's how much you will lose while the system is down

# Disaster Recovery

- Evaluate how far you want your disaster recovery plan to go
  - Protection if something happens to your office, city or even state
  - How long can we afford to be down
  - What existing equipment do I have to use

# Disaster Recovery Options

- Out source (even to a vendor in a different state)
- Make your own backup
  - CD, DVD, external hard drive, tape drive
- Your own second server off site
- Solutions that provide hot-swappable drives you can remove and take home

# The Plan Itself

- Retention policy
- Making sure all components are backed up
  - SQL server, Active Directory, Exchange data, data

# Technology v. Paper

- Work from anywhere, anytime
- Less running to the copier, postage and file room
- Accidental deletion of documents
- Misfiling
- Lost files
- Running back and forth to file room

# Paperless Office: making the dream come alive!

- Good scanner that *automatically* sends PDF files to a user's computer
- Cost recovery program
- Document management system
- Training
- Communication

# Speaking of Communication

- Every user will have a different way of arriving at the same place – that is okay
- Every user actually should know several ways to get to the end point

# Nuisance Problems – Lack of Training

- Training is a vital part of making any system work
- It is often overlooked as “not a necessary expense” or something “we can do on our own”

# How Do We Get Training

- One user can be trained and bring that training back to others
- The company you choose can do the training for an entire firm
- An independent trainer can come in and do the training for the firm
- Some companies offer on-line training sessions

# Things To Consider When Scheduling Training

- Some users will require less training than others will due to their job description. Group users accordingly.
- Online training will require the user to have a certain level of knowledge before beginning

# Tips to Leave With

- Get all users onboard
- Examine all options
- Make a plan detailing what you need from the system
- Ensure adequate training
- Make sure you have all necessary equipment/hardware
- Use the system



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*Knowledge. Innovation. Resolution.*