

Systems to Increase Productivity

Aside from the typical “In”, “Out” and “To Do” boxes, there are now software programs out there to help make your life easier. In this section we’ll examine a few of the programs that are available as well as how to make your transition to those programs a smooth one. We will also go over some of the advantages of a paperless office and what you need to do today to protect your data in the event of a disaster.

How to Establish a System that Reduces Errors and Omissions

First things first – find out what products are out there! There are several systems out there to consider. If you do your research online you can probably find screen prints of the system or maybe even a working demonstration. Some companies will require that you request a demo with a sales rep while others will offer you a limited version of the product for a trial period.

Some things to consider when searching for a practice management system include: the area of law your firm practices; the number of users; what you need the product to do for you (i.e., billing, case management, accounting, or a combination of those); and the training required by each program and where you will obtain that training.

Some programs you may want to look at include, but are not limited to, ProLaw, Tabs3, PracticeMaster, Needles, Time Matters, Billing Matters, PCLaw, Abacus Law, Amicus Attorney, and Perfect Law.

Another consideration is your current IT staff. If you have IT staff that works for your firm they will be able to talk directly with the company you choose and learn the program as well. If you are using an outside vendor to provide IT services then you should find out if they are already familiar with any of the programs. That does not have to be a determining factor but you do want your IT folks to have some familiarity with the program. You should expect some technical problems and it does help to have someone who is familiar with the program you use. If they are familiar with any of the systems, hear what they have to say and take that into consideration. If they are not familiar with the program you choose you have two choices: find a new IT company or continue to work with them and allow them to become familiar with the program.

Building Flexibility Into Your Systems and Processes

Any system will require customization and no matter which system you choose you should remain flexible. Things will likely change as you customize the system to your needs and you need to be receptive to this change. Hopefully, if you've done your planning ahead of time it won't come down to a total revamp of the system, but it may. To avoid this you should make an outline of what information you need the system to give you. Some of this information will be easily input into the pre-defined areas while others pieces of information will require that you create a place for it to go. To complete this task you will need to take into account all the areas of law that will need to utilize this system. The attorneys in your office may only practice in one area of law or you may have three or four that you need to plan for. This will all need to be considered before the initial customization of the system. While we all hope to get it 100% correct the first time, you will likely need to make some changes (hopefully only minor) during the first few months of use.

Another consideration is how flexible the system is in allowing more users to be added. You should plan that your firm will grow and you need a system that can grow with you. If you purchase a program that is designed for a maximum of 10 users because that's what you need at the time, what happens over the next few years when you need to add more users?

Planning Ahead: Security and Disaster Recovery Plans

You will need to make sure your system is secure from outside users and that you have a **working** disaster recovery plan in place. For most this means putting in place a plan to prevent down time which usually equates in our minds to the server crashing. While you certainly should plan for that, what happens if something else goes wrong such as a natural disaster that affects your entire city? Have you prepared?

In terms of keeping your system secure you might want to institute changes such as changing your passwords on a regular basis, making sure your server IP address is not viewable to the public eye and making a terminated employee's account inactive/disabled. If you plan to leave an employee's email account "on" for a given

timeframe after they leave the firm and forward the messages to them make sure you at least disable their remote access.

When deciding how to accomplish your disaster recovery goals you need to decide if you want the plan to run itself or require user intervention. Most programs will include a backup function to backup their data. From there you will need to put that data (and maybe some of your other data) onto some form of media for recovery later if need be. There are also some built-in functions in Microsoft that will run backups for you as well as third-party software.

Some recovery options include simply making backups of data; having a backup server off-site that is ready to be “turned on” at any time; using a vendor that provides backup services (this may help in the case of a natural disaster that takes down your entire city); keeping daily, weekly and/or monthly backups (one of which should be off-site). There are also units that serve as an all-in-one solution. They provide software to backup your server, space to have multiple drives to backup to with ease, and the ability to easily pull out one or more of the drives and take it with you.

One of the most common ways to back up data has been tape drives. You can also burn CDs or, more likely, DVDs with data. Another option would be external hard drives (one in the office and one out of the office). Whichever option you choose you should check on the backups to make sure they run and also periodically test them to make sure you are able to retrieve your data from them. You should make sure that in addition to your data you are also backing up all necessary components such as your SQL server, the Active Directory, Exchange data, etc. You will also need a retention policy in place that states how often you will overwrite data.

To see how important a disaster recovery plan is to your firm, you should look at the average number of hours billed per day and the money associated with those hours. That’s how much you’re losing every day your system is down. Some options will require that your system is down for a couple days while everything is pulled together while others may provide little to no down time.

The Advantages and Disadvantages of Paper vs. Technology

Technology offers us the possibility of working from anywhere, anytime. Advantage? Disadvantage? It could be both!

The most obvious advantage is that while paper straps us to the office and to a file cabinet, technology allows us to work from home. If documents are scanned in and organized into the files you can easily work when you are not in the office or even when you are. It is very nice to not have to run to the file cabinet every ten minutes to find a document you need (or hope to find the document). Instead you can go to the matter in the system and see a copy of the document you need. A disadvantage of this is that the files still need to be maintained and kept organized and sometimes they are forgotten about because it's all in the system.

Another advantage is that you may find you can cut down on time spent at the copier and on postage. Your documents are already scanned and in the system so you may find it will be quicker and easier to email them to someone instead of copying and mailing. For instance, if you utilize the services of a nurse who is an independent contractor to help you review medical records, those records only need to be scanned in one time and then they can be emailed to the nurse versus having to both scan in and copy and mail the records.

A disadvantage of technology, and likely the reason we will never be completely paperless, is that it's easy for a user to accidentally delete a document or misplace it in the wrong matter or area. We can put in safeguards such as limiting a user's delete capabilities and using backups, but accidents do happen. By the same token, a paper can certainly get lost or misfiled but paper has a tendency to turn back up.

Key Elements for Transitioning to a Paperless Office

A paperless office: making the dream come alive!

The concept of a paperless office could be just a dream for most law offices but any office can start working towards that goal and one day we may just reach that dream. One of the most important pieces of equipment for a paperless office is a good scanner. Most copiers are now digital and they will also scan. However, you should make sure

that your copier/scanner will also send the scanned file to your computer. Not all machines automatically do this and that alone can cause a major slowdown.

Using a cost recovery program and integrating that with your billing system can also help to make the transition easier. A cost recovery program attached to your copier and even your phone will help you automate the process of tracking and recovering your costs for copies and long distance.

You should also invest in a document management system. Some of the case management programs have a workable program built in while others do not. Most, if not all, of the programs will integrate with one of the leading document management utilities. This will prove to be beneficial in making sure all documents are saved onto the server (not the user's computer), the document is in the correct folder and that the document has a description attached to it.

Communication as the Key

The key to any system working well is communication. Communication can be in the form of training or simply just making sure all users are on the same page. It is no surprise that every user will have a different way of thinking about what to name a document or how to find a document. To remedy the problem of one user becoming frustrated by not being able to find something, all users must know several ways to find documents and maybe even have a list of document names and descriptions.

Nuisance Problems – How Minor Issues Can Become Major

Training is likely your number one problem. Money needs to be spent in this area so that it can be done correctly and all users feel comfortable. This is especially important in a larger firm where there are many users with varying skill levels. However, training is important no matter what your firm size and it's an area where the "powers that be" will likely not want to spend money. It is, however, a vital part of the process.

Training can be accomplished by either one user being trained and then bringing that training back to everyone or by having a trainer come in and train the firm in groups. Different user groups will need different degrees of training. For example, attorneys may only need 2 -3 hours of training while someone in bookkeeping/back end administration

may need 8 hours due to the type of work each will be performing. The company you are purchasing the software from should offer different types of training some may even be at no cost. Depending on which program you choose there may also be a local trainer available.

Another seemingly small but common problem is a user not logging in an email they received/sent. Sometimes it's just easier not to do so. However, this will end up causing a problem for someone else down the road. All members of the firm need to be dedicated to using the system or it will not work. If emails, notes, or letters are missing from the system then it's not a workable solution. If users don't commit to using the system or are afraid of the system then it's not a workable solution.

Conclusion

When looking to implement a new case management and/or billing system it is important to:

- Make sure all users are onboard
- Examine all your options carefully
- Make a plan detailing the information you need from the system
- Make sure you have adequate training in place
- Make sure you have all necessary equipment/hardware
- Use the system

With all of these steps covered you should be well on your way to a great electronic system!