How to Make Your Law Firm's Existing Technology Work Better

By Andrew Z. Adkins III
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Bill Gates' vision of a PC in every home and office became a reality (smartphones too though he didn't predict that). But what purpose has all this technology served? It should increase your law firm's productivity and bottom line — and improve your life. Has it? If your law firm has not implemented the right policies and strategies, technology can prove a very expensive Pandora's box that results in endless frustration. In this TechnoFeature article, legal technology consultant Andrew Adkins explains why technology fails in law firms, and how you can reverse these problems using the technology you already have. So stop complaining about your billing software, and instead read Andrew's advice on how to get your law firm's technology in gear and keep it on track.

INTRODUCTION

I love the seasonal change into fall, especially down here in Florida. We've got cooler weather coming in to replace the intense summer heat and we've got football season — all good things. Then again, we've also got elections and stump speeches filled with (future) broken promises. "If elected, I promise to blah, blah, blah." I don't know about you, but every election I hear politicians making the same promises that ultimately tend to go nowhere.

What do elections have to do with technology? Promises made, promises kept, and promises broken. We all know technology is supposed to make our lives better — but does it really? Do you have more time for yourself and your family now than before or has your BlackBerry over-tethered you to your clients? Are your fancy new computers helping you make more money or do you feel like you overpaid for a product that under-delivered? Are you really using less paper?

While we can elect our political officials, we can't do much about them after we've put them in office. But, we can do something about technology after we've purchased it — and I'm not talking about "Throw the Bums Out." I'm talking about real, down-to-earth tactics to help make your law firm's existing technology work better for you.

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THE THREE-LEGGED TECHNOLOGY STOOL

I often lecture on how technology can help to improve a law firm's bottom line. But just because you buy new software doesn't mean it's going to automatically increase your law firm's performance. You have to take time to learn the new software and in many cases, configure it for your firm's different practice groups.

As an independent legal technology consultant for more than 20 years, I often hear stories about law firms that purchase a new software application only to complain that it doesn't work and they want to replace it — without looking into the real reason why the offending technology in question may not be working as promised. When faced with this type of problem, I like to share the concept of the the three-legged technology stool with the firm. One leg is technology, one leg is people, and one leg is processes. If any of the legs are shorter than the others, it sets the stool off balance, and makes it easy to tip.

1. The "Technology" Leg

Technology comes in a variety of flavors and firms often struggle to pin down their true needs. However, most firms use Microsoft Office (2003 or 2007) and some sort of Time and Billing System. About 60 percent of the legal profession uses a Document Management System, and only about 35 percent uses a Case/Practice Management System. (I've conducted many legal technology surveys over the years, most recently the *2010 Perfect Practice Legal Technology Institute Study*.)

The amount you should spend on technology varies depending on your firm's requirements. But for comparison purposes, the *2010 ILTA Member Technology Purchasing Survey* states that law firms spend between 2 percent and 4 percent of their Gross Revenue (not including IT staff salaries).

You don't have to go out and buy a new practice management software system in order to become more efficient. It will definitely help you increase your bottom line, mind you, but implementing such a system comes at a cost in terms of time and resources. In the meantime, you can make your existingtechnology work for you by incorporating a few simple processes into your business.

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2. The "People" Leg
If I've said it once, I've said it a thousand times: Training is the number one reason for successful software implementations. Lack of training is the number one reason for failed software implementations. Let's explore some examples.

How many of you know how to create client folders and sub-folders on your network drive? If you know that, then you should also know how to create client folders and sub-folders in Microsoft Outlook. I've got a few clients that keep everything (every email message) in their Inbox — thousands of emails. These individuals spend too much non-billable time searching through their email. Learn to use the "Search" feature of Outlook. If you don't know how to organize your Inbox, it's not the technology that's at fault — it's you.

How many of you work from home? Do you access your firm's network from home to get documents or do you email them to yourself at home? If you email them to yourself, is it because the firm doesn't have remote access or is it because the remote access is too difficult to use?

I'm not pointing fingers at anyone. I'm just trying to point out the fact that the "people" part of your firm's three-legged stool may be a little short.

You don't have to take a whole day off for training. Set up simple 30 or 60 minute focused training sessions. Learn how to create PDF files and attach them to email messages, create a Table of Authorities in Word, access the office system from home, and, best of all, use your smartphone. Doing so doesn't take that much time and effort — and it is certainly low cost. (As a side note, you'll have better luck luring people to the training sessions if you provide some tasty munchies).

3. The "Processes" Leg
Let's turn to a processes. Some are easier than others. You've probably heard the term, "best practices." Well, how effective are your firm's practices? For example, when your firm opens up a new client file, who does it, and how?

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In a lot of firms, the client calls and wants to speak to an attorney. The receptionist may ask a few pertinent questions, then put the caller through to the appropriate attorney's secretary or directly to the attorney. The attorney takes a few notes and gathers the initial information, either writing it down or typing it into the computer. Many firms use a "New Business Memorandum" to make sure they take down the initial matter information. Then the fun begins.

To open up a new client file in the office, the attorney's secretary begins a process of notifying the accounting department, which then creates a new client/matter number, opens the file in the firm's accounting system and, if the firm has one, opens the file in the document management system (unless the accounting system directly links to the DMS).

Somewhere along the line (hopefully), someone conducts a conflict of interest check. Then the secretary creates the client folder on the network and in Microsoft Outlook and also creates the client's paper file. Keep in mind, dozens of different scenarios exist, but you get the idea — client intake is a "process."

I'm working with a firm right now that maintains multiple offices in multiple cities where attorneys in all offices work on the same matters, which in effect turns the entire team into a centralized virtual office. However, during my site interviews, an attorney in one office produced a "New Client Memorandum" form and the secretary in the home office said, "I've never seen this before." Clearly, the "process" leg of this firm's stool has fallen a little short.

Technology can help improve your internal processes and workflow, but many law firms don't understand the connection between technology and processes. In many cases, standardization is a "four-letter word."

STANDARDIZATION

Speaking of which, for an office to maintain technological efficiency, the office needs to standardize technology, people, and processes as much as possible.

A prime example with which most everyone is familiar concerns cell phones, and smartphones in particular. Sure the iPhone is cute and cuddly, but it is a royal pain for most law firm IT departments because it does not follow the standard "best practices" in law firm technology. The details lie beyond the scope of this article, but for those of you who gripe because you can't open all your documents and email attachments on the iPhone — don't blame IT.

If you want attorneys and staff to enjoy the ability to use whatever cell phone or smartphone they want, regardless of privacy issues, then don't blame the IT department when the phones don't sync with your existing environment. Instead, try to figure out how best to standardize — or in this case, require everyone to use the same type of smartphone.

CONCLUSION

To make technology work for you, follow some simple rules. First, try to standardize your technology and keep your main software applications up-to-date, or at least only one version behind. Second, look at some of your main processes and ask yourself if you can make them more efficient. Third, implement some type of ongoing training program for your attorneys and staff. All of this will keep the three-legged stool balanced.

Andrew Z. Adkins III is the president of the Legal Technology Institute. He has been a legal technology consultant since 1989, written more than 200 articles, and given more than 200 presentations regarding how lawyers can better use technology in their daily practice. He is also the author of several books including, "The Lawyer's Guide to Practice Management System Software," published by the ABA Law Practice Management Section in April 2009. He was also the chair of the ABA TECHSHOW in 2000 and 2001 and the co-chair of LegalTech Conferences 2000-2007.