

Exercising Your Options II: Researching, Testing, Implementing and Training for Case Management Software

Andrew Z. Adkins III

Director, Legal Technology Institute

Associate Director, Technology Services

University of Florida Levin College of Law

CMSs for Solo & Small Firms

- AbacusLaw www.abacuslaw.com
- Amicus Attorney www.amicus.ca
- caseManager Pro www.casemanagerpro.com
- Client Profiles www.clientprofiles.com
- PracticeMaster www.stilegal.com
- PerfectLaw www.perfectlaw.com
- ProLaw www.prolaw.com
- TimeMatters www.timematters.com

AbacusLaw

- Front Office/Back Office System
 - (Silver, Gold Editions)
- Integrates with HotDocs
- Integrates with other T&B Systems

- www.abacuslaw.com

Amicus Attorney

- Front Office System
- Day Timer Look & Feel
- Includes Document Management Function
- Integrates with HotDocs, PCLaw, Timeslips, QuickBooks, Tabs3, Juris, Worldox, CompuLaw

- www.amicus.ca

caseManager Pro

- Front Office System
- True Application Service Provider (ASP)
- Hosted in Your Firm or Outside Provider
- www.casemanagerpro.com

Client Profiles

- Front Office/Back Office System
- eRouter Module (Imaging, Routing)
- www.clientprofiles.com

PerfectLaw

- Front Office/Back Office System
- Includes Document Management Function

- www.perfectlaw.com

PracticeMaster

- Front Office/Back Office System
 - Modularized: integrates with Tabs3
- Integrates with QuickBooks, HotDocs, Worldox, CompuLaw
- www.stilegal.com

ProLaw

- Front Office/Back Office System
- Includes Document Management
- Integrates with WestLaw
- Integrates with HotDocs,
Hummingbird, Interwoven, Worldox
- www.prolaw.com

Time Matters

- Front Office System
 - Integrates with Billing Matters (Back Office)
 - Also integrates with Juris, PCLaw, Tabs3, Timeslips, QuickBooks
- Provides Document Management Function
 - Also Integrates with DOCS Open
- Recently Acquired by Lexis-Nexis
 - Lexis-Nexis also acquired PC Law
- Integrates with Lexis
- Other Integrations
 - HotDocs

- www.timematters.com

Know Your Current Technology

- Document Production, Storage, Retrieval
 - Word or WordPerfect (are you willing to change?)
 - Worldox, Hummingbird, or Interwoven
- Email, Calendar
 - Microsoft Outlook or Novell GroupWise (are you willing to change?)
- Remote Access
 - Web access, Citrix, FTP
- PDAs, Smart Phones
 - Blackberry, Treo, Other (are you willing to change?)

CMS Integration

- How does the CMS integrate with:
 - Your billing system
 - Your word processing system
 - Your document management system
 - Your email system
 - Your calendar

Customization & Configuration

- Data Input Screens
 - Different Input Screen for each Practice Area
- Calendar & Rules
 - Different Rules for each Practice Area
- Documents & Templates
 - Different Documents for each Practice Area
- Reporting
 - Different Reports for each Practice Area

RFPs: Formal or Informal?

- Provides a “paper” comparison between systems
- Compare feature sets, costs, similar experiences, references
- Provides the developer with an overview of your firm, practice areas, & technologies

CMS Presentations: Cut the Crap

- You Drive the Presentation, NOT the Sales Rep
- Prepare a Detailed Agenda & Demo Roadmap
- Review various law firm processes
 - Open a new matter
 - Generate a document
 - Create a rules-based calendar appointment
- Discuss Technical Integration Issues
- Discuss Data Conversion, Migration
- Discuss Implementation Timelines
- Compare the Same Feature Sets with Other CMSs

What to Compare

- Interface
 - This is what your attorneys & staff will use daily
- Integration with Existing Systems
 - Will you need to change any software?
- Customization
 - Can you configure the system for different practice groups?
- Implementation Plan
 - Does this meet with your time table?

CMS Implementation Gotchas

- Scope Creep - not a clear scope of services
- Data conversion – your existing data is not as “clean” as it needs to be
- Training – attorneys decide that they don’t need training; they’ll learn it on their own
 - Worse – they won’t let their staff attend
- Unkept Promises – vendor promises not met or delayed
 - This is one reason to check references
- Implementation Delays – firm doesn’t keep up with their responsibilities

Sure Fire Ways for a Successful Implementation

- Do Your Homework
 - Understand what a Practice Management System is *and* what is it NOT
- Clearly Defined Scope of Services
 - Software, Conversion, Implementation, Training
- Full-time CMS Administrator for the initial implementation; someone within your firm
- Have a Technology Committee committed to the project
- Training, training, training (Did I say training?)

Thank You!

Andrew Z. Adkins III

Director, Legal Technology Institute
Associate Director, Technology Services
University of Florida Levin College of Law

PO Box 117644

Gainesville, FL 32611-7644

352.273.0765

adkins@law.ufl.edu

www.law.ufl.edu/lti