

# LEGALTECH<sup>®</sup>

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## LT3: Leveraging Technology for Better Firm Efficiency

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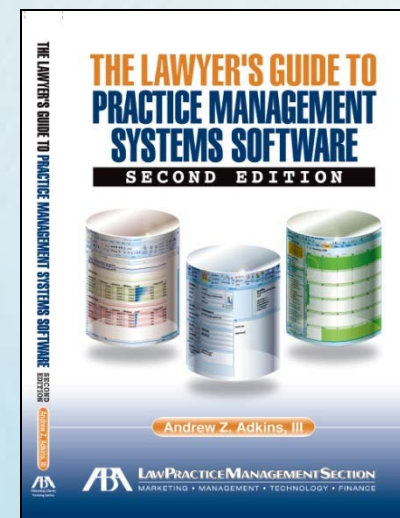
Gainesville, Florida

# Agenda

- Introductions
- What are “Processes”
- Automating “Processes”
- Case, Matter, Practice Management Systems
- Return on Investment
- Questions

# Andrew Z. Adkins III

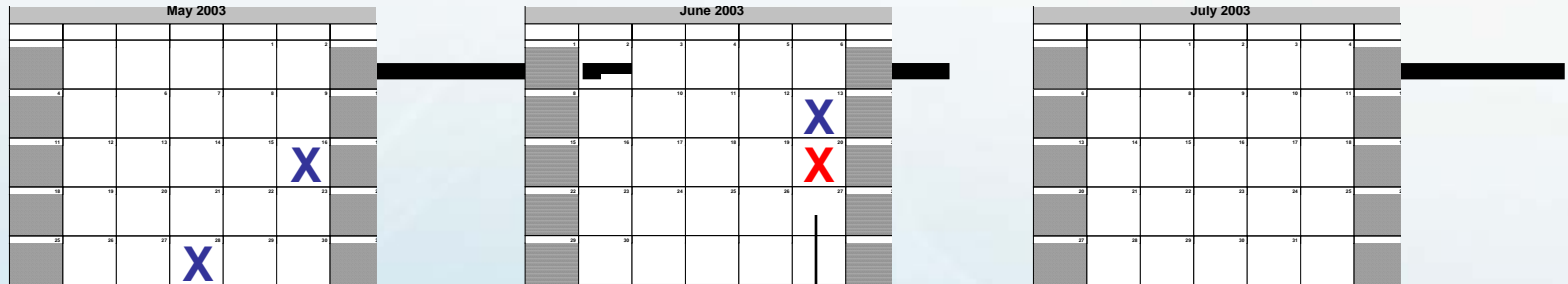
- University of Florida Levin College of Law (1997 – present)
  - Director, Legal Technology Institute (1997 - present)
  - Adjunct Professor, Law Practice Management (2001 - present)
  - Associate Director, Technology Services (2003-2007)
  - Executive Director, ICAIR (1998 – present)
- Legal Technology Consultant (1989)
  - More than 325 consultations with Law Firms, Law Departments, Judiciary, Legal Verticals
- Author
  - *Three Years, Eleven Months, 29 Days* (2009)
  - *The Lawyer's Guide to Practice Management Systems Software* (2009)
  - *You Can't Get Much Closer Than This* (2005)
  - *Computerized Case Management Systems* (1999)
  - *WordPerfect Law Office Solutions* (1995)
  - *The CMS Study, The KM Study, The ASP Study, The Internet Study*
  - More than 200 articles published on legal technology
- Chair ABA TECHSHOW 2000, 2001
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# Processes

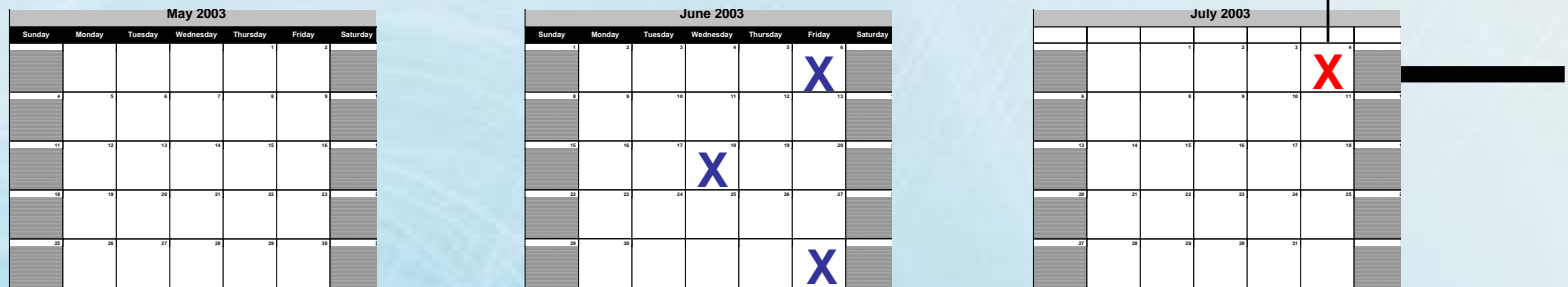
- File opening
- Conflict checking
- Calendaring, docketing
- Case/matter tracking
- Doc. Production, delivery
- Document management
- File and records mgt.
- Communications
- Client relationship mgt.
- Time tracking & entry
- Billing
- Cost recovery
- A/P, check writing
- A/R, collections
- Payroll
- Trust accounting
- GL, accounting
- Practice management
- Litigation support
- Legal research
- File closing
- Budgeting
- Reporting

# Ruled-Based Calendar Example



Key Date 5 weeks

Postpone 3 Weeks



*... Automatic rescheduling*

# How to Automate a Process

- Document the workflow
- Inventory your technology
- Determine your firm's best practices
- Select the technology
  - Build or buy decision
- Implement the technology
- Configure, customize the system
- Train, train, train (did I mention training?)

# Case, Matter, Practice Management Systems

# Differences in Case, Matter, Practice Management Systems

- ▶ User Functions, Interface
  - How the firm will use the software's functions and the interface presented to the users. Not everyone will use all functions.
- ▶ Customization/Configuration
  - How flexible the software is in customizing the user interface screens, the document merge, calendaring, and reporting. If you have several different practice groups, each has their own needs.
- ▶ Integration
  - How the software interacts and integrates with other software systems and the computing environment the firm uses. This includes Microsoft Outlook, your firm's time & billing system, your firm's document management system, and PDAs.



# 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?

# Return on Investment

- Assume the software saves you 15 minutes per day (could be more)
  - You can bill 15 minutes more per day
  - @ \$300/hour
    - \$75/day = \$375/week = \$1500/month
    - Don't forget to add impact from billable staffers too

*\$18,000 per lawyer per year*

# Questions

- What is the best CMS on the market?
- What is the biggest obstacle to implementing a CMS?
- Do I know an independent legal technology consultant who is knowledgeable about case, matter, and practice management systems?