

Case Management and You

New Orleans, New Law:
Community Revival with Technology



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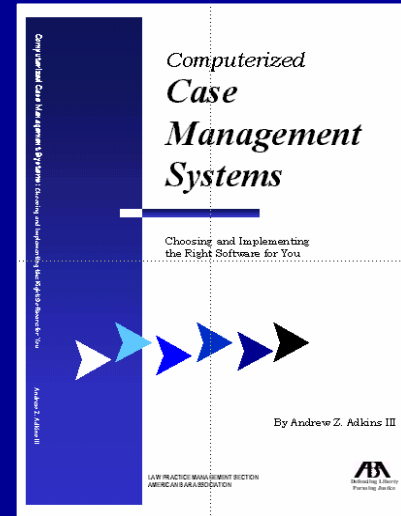
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Agenda

- Introductions
- CMS Systems for Solo & Small Firms
- Differentiators & Comparing CMSs
- Understand Your Current Technology
- Implementation Issues
- Q&A

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- Legal Tech Consultant – 17 Years
 - Over 350 personal consultations
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- Chair ABA TECHSHOW 2000, 2001
- Author
 - *You Can't Get Much Closer Than This*
 - *Computerized Case Management Systems*
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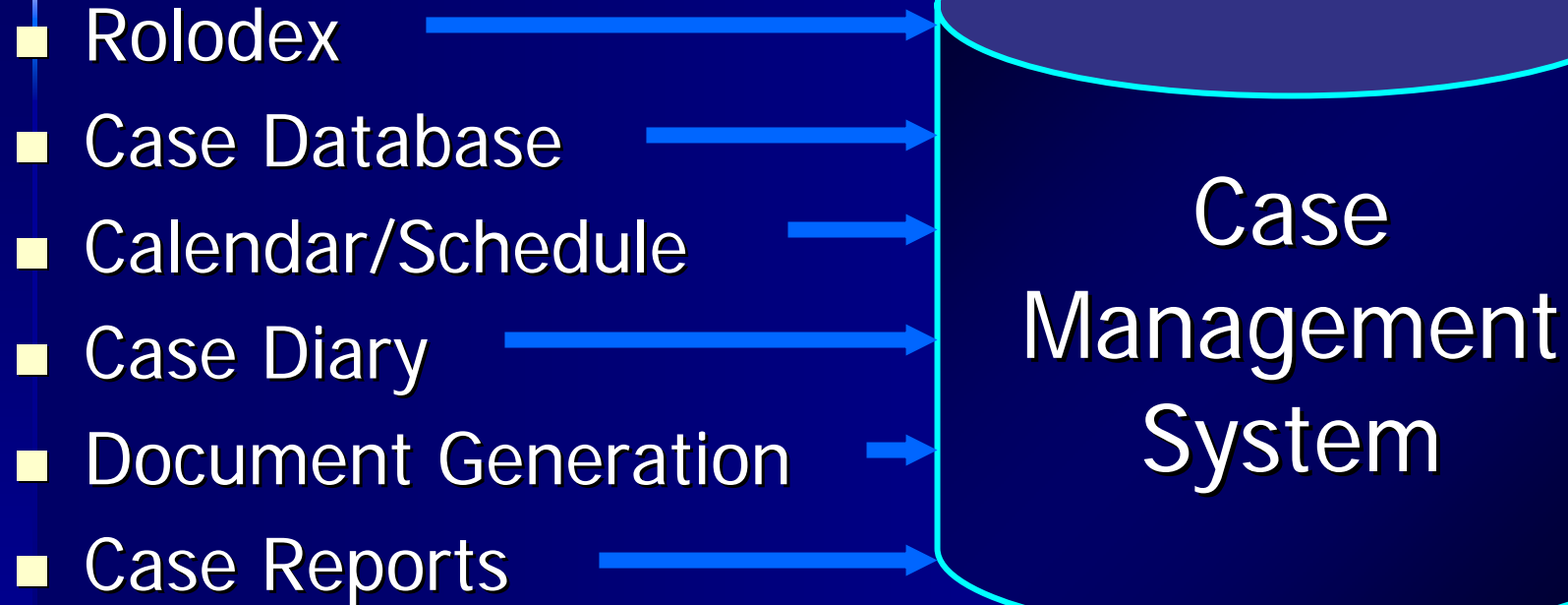
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What Do YOU Need?

Manual Case Management

- Rolodex/Contact Database
- Case File Management
- Calendaring/Scheduling
- Generate Documents
- Case Reports/Firm Reports

Case Management '101



- **All CMSs Have These Functions!**

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?)

Sure Fire Ways to Fail a CMS Implementation

- Do it yourself
- Skip the training
- Don't trust the CMS developer
- Let your secretary's son handle the installation
- Expect the vendor to do all the work

The Cost of CMS Technology

- Range of \$2,500 - \$8,500 per user (without any hardware/network upgrades)
 - 25% - 45% for Software
 - 55% - 75% for “Soft Dollars”
 - Installation, Integration
 - Customization
 - Training
 - Annual Support
 - Non-billable lawyer and staff time involved in implementation



Return on Investment

- If the software saves you 15 minutes per day
 - 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

Solo Practitioner

- Abacus Law
- Amicus Attorney
- Time Matters

1 – 5 Lawyers

- Abacus Law
- Amicus Attorney
- Practice Master
- Time Matters

6 – 10 Lawyers

- Abacus Law
- Amicus Attorney
- caseManager Pro
- Practice Master
- ProLaw
- Time Matters

More than 10 Lawyers

- caseManager Pro
- Client Profiles
- Perfect Law
- Practice Master
- ProLaw
- Time Matters

Thank You!

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