How to Provide Large Firm Service on a Small Firm Budget

by Seth Rowland

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How to Provide Large Firm Service on a Small Firm Budget

Ever wonder how the "fat cats" live – large firm lawyers in their glass towers with ultramodern furniture from Milan, bottomless technology budgets, and hordes of eager associates and support staff just a holler away? I used to be one of those lawyers in the distant past. Then I joined the scrappy forces of the freedom fighters, fighting a guerrilla war armed with technology and an idea — the idea that service is king.

Large Firm Envy

There is this perception that large firms with large technology budgets can crush the opposition with their technical prowess. Large firms do invest heavily in technology, but the large majority of their resources go into staff salaries and real estate. Large firms solve problems the old way — with people, not technology.

And so this presents an opportunity for smaller firms to shift some of their resources from staff to technology. In so doing, your firm can become more productive and in fact more "service oriented" than your larger firm counterparts.

With a high-performance server, properly configured network, decent PCs, and a case (practice) management system, you can match or exceed the service provided by large firms on your small firm budget. There's no need to feel any large firm envy.

Understanding Large Firms

Good solid hardware is a prerequisite for anything to do with computers. It is not the "fancy equipment" that marks a large firm, but rather the ability to handle huge amounts of data.

- Large firms with hundreds of fee earners have document management systems. It's a simple proposition; if you have hundreds of people creating dozens of documents a day, you have 50,000 new documents created each month.

- Large firms with millions of dollars in fees each month have billing and accounting systems.

- Large firms with high-profile "bet your company" litigations have litigation support systems.

- Large firms with thousands of clients and document retention requirements have major email systems, usually Exchange Server, which also doubles as a firm calendar and contact manager.

What large firms usually lack is a case management system. That's because large firm attorneys generally work on a few cases supported by a staff of associates, paralegals, and secretaries. It is their "calendar" that is paramount since the staff are responsible for handling the "data."

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The Small Firm Approach

Small firms should use a case (practice) management system (CMS) to level and tip the playing field. A CMS replaces the entourage of support personnel in a large firm. And a CMS can provide superior service to the practitioner at a far more affordable cost. Let's explore the most critical components of a CMS.

Document Management

The typical CMS comes with a document management system (DMS). It's simple. Open a file and click on the documents tab (or Brad), and you are presented with a list of all relevant documents for the file. One more click, and you have the document open ready to revise.

Some CMS simply point to where a document is located. But the best CMS will actually name the file, create a folder on your

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server, and place the file in that folder automatically. So if you need to find a document, no need to call your minions. Just click open the file and it awaits your next command.

Email
Small firm practitioners have more email per capita than their large firm counterparts by the simple fact that they work on more cases and engage in more marketing.

Outlook and Exchange Server have become the de facto standard for all attorneys, large and small. However, with an integrated CMS, the email (and its attachments) can automatically be added to a client/matter file. You can "link" the email to a file from within Outlook, or you can batch import many email messages into your CMS.

The result is something uniquely different. Rather than each individual creating personal folders in their separate islands of data, the email automatically joins the data, documents, calls, notes, and other information that are part of the electronic case file, available for everyone to review.

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Outlook v. CRM
Apart from the central address book, most large firms enable personal calendars and personal address books. They allow certain people to see other calendars (such as a secretary and a partner), and give people the ability to send out "invites" and check availability.

Compare this to the Contact Relationship Management (CRM) features of a CMS in which you have a shared master contact list on which designated contacts can be kept private. You have a "private" calendar that can be made "public" to a small group or the entire firm. Rather than sending invites (which you can still do), you can see what activities your colleagues are engaged in on their schedule and plan your schedule around it.

More significantly, every contact has a complete history. This history includes associated notes to file, phone slips, bill slips, documents, appointments, and task history. The wealth of information on your contacts is available in seconds. As the call comes in from the client (or prospect), you can use your CMS to pull up a complete snapshot of that person, their file, and what you still have left to do.

Procedures
Efficiency is a major key to client service. Talent is the other. Efficiency can be achieved by extensive training or intimidation. It can also be achieved by simple and clear procedures.

With a CMS, efficiency can be achieved through software. If there is certain information that is required to open an "estate file" your CMS can require that data be entered as part of the open file process, and then can trigger certain action items that must be completed.

Use the CMS to train the user into the proper procedures for handling client matters, or at least triggering them to do the right thing. If certain activities should occur upon the completion of one activity, a CMS can be configured to automatically calendar those activities on the file and on the staff member's calendar.

Priorities
In a large firm, the priority is dictated by the calendar (court or filing deadlines) and the senior partner. In a small firm, there are various demands on your time — tasks that straddle multiple matters and multiple clients (not to exclude those personal tasks necessary to family life).

With a CMS, you don't just have a one-dimensional task list. Tasks can be grouped

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by categories, file, priority, and assignment. With a CMS you can truly manage your tasks. When working on a file, you can see all tasks for all participating staff on that file and easily reassign or reprioritize a task. When working on your list, you can assign a priority based on timeliness and importance. What this means is that you can get more done, in the same time, with less stress.

Search

In a large firm, search means finding the needle in the haystack — the "smoking gun" that will turn the tide. And so big firm search is "case-centric" and not "global." With a CMS, everything on the file is by definition searchable, as well as everything else on *all* the other files. A good CMS lets you define complex layered search criteria to find what you need (whether in a document, note, or profile) in seconds.

When I was a big firm associate, the partner would issue a list of search requests in a memo, which would be circulated to the team, which would then stop all work until the search had been achieved. With a CMS, the case notes and the documents are all searchable. Modern scanners that scan to PDF can perform OCR (optical character recognition) on the image and include in the PDF the words on the page, thus making it searchable. When you search your CMS, you will be amazed by what you can find.

Document Assembly

How long does it truly take to draft a letter, compile a status report, or produce a power of attorney? The time would truly shock you. Many of these standard documents can be created in seconds with a CMS.

Small firm lawyers "get" document assembly. They understand that these documents need to be consistent and complete. Most of the data needed to assemble these documents is already in the CMS. And so, the CMS includes tools or hooks that merge the data in the CMS into a Word template (or a HotDocs template).

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Conclusion

Look at your budget and where you spend money. With technology, you either pay now (and reap the benefits) or pay more later (without the benefits). If you want to better serve your clients, better serve yourself, and outclass large firms, get a CMS.

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his work on document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems LLC (www.bashasys.com), has helped many law firms build customized practice management and workflow solutions. Basha Systems currently offers consulting services for Amicus Attorney, Time Matters, Advologix, HotDocs, Exari, and DealBuilder. Please visit Seth's blog (www.bashasys.info).