

Technology eReport

The Online Supplement to GPSolo Technology & Practice Guide

Volume 1
Number 4
October 2002

Stop, Look, Listen...Then Do: The Argument For Practice Management

By Seth Rowland*

When my son entered kindergarten last year, the first lesson he learned was the following: "Stop, Look, Listen ... then Do." When Mrs. Lucas rang the bell, he was to immediately "stop" what he was doing and "look" around to see where the teacher was. He was to then to "listen" to what the teacher had to say. And only then was he to "do" whatever he was supposed to do.

Robert Fulghum said that everything you need to know, you learned in kindergarten. When it comes to assessing whether you want or need a practice management solution, follow Mrs. Lucas's directions.

"Stop." Most lawyers are too busy rushing from one important matter to another to give proper attention to yet another matter. Each day only has so many hours. You need to stop before you can think. Find a solid uninterrupted hour, maybe even a whole day, when you have no client or management concerns.

"Look." If you are in business, you are currently managing your practice. This doesn't mean you manage it well or couldn't manage it better. But before you launch into a new practice management system that will turn your office upside down, "look" at how you manage your office. Evaluate both your manual and electronic processes.

Whether you work with a consultant or brazen it out on your own, you will need to know what you are currently doing. Talk to the secretaries, the paralegals, the associates and your partners. Look at your billing records by category of work. Look at how current (or not) your colleagues are in entering their time. Document the current processes. Realize that any change should build on and extend existing processes.

"Listen." You can, of course, listen to consultants. You should talk to colleagues at other law firms to understand the solutions they chose. Ask them how they implemented those solutions, not just what product they chose. Most of all, listen to your staff. Find out what they want. Find what is missing from the current system, what processes "don't make sense."

"Then Do." After you have stopped, looked, and listened, you need to act.

This is the hardest part because it requires expenditure of time and money, with no immediate payback. Automation projects have a tendency to drag on. The longer they drag on, the more expensive they get. Once you have done your due diligence, come up with a project plan and start implementing it. The time to act is now.

Implementing a practice management solution is an investment in your business. Practice management is not a "must have" toy that you show off to potential clients, much as I show off the Alienware Area-51M laptop I am using to write this column. It is a tool that no client ever sees directly, yet affects everything that you do for them. A practice management solution insinuates itself into the way you relate to your clients and the way you practice law.



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By “practice management” I mean the care and feeding of existing clients. Practice management allows you to know every last detail about your clients. Through contact profiles and related notes, tasks, events, calls, emails, and documents, you can know at a glance what to report when the client calls. You can “mine” your database to know which clients would benefit from news about a change in the tax law, which incidentally would mean more business for you when they come in to get the appropriate documents drafted to gain the benefit of the change.

By “practice management” I mean effective prospecting for new clients. Your database can store details on anyone you know or want to know. You can build marketing campaigns to approach certain groups of contacts and use the system to produce letters and e-mails, with ticklers to remind you to make follow up calls. It may even be as simple as getting the business cards you picked up at your last seminar into your system and sending a thank you note by e-mail.

By “practice management” I mean the consolidation of all information relating to your cases in a single place. Most attorneys will carefully create an accordion file when they open a case with folders for correspondence, pleadings, and other matters. More than half of the relevant information will never get into the redweld. More often, it will be inconvenient to grab the redwelds and thumb through them looking for the information you need. With a database, all the information in the redweld is a single click away. Just open the matter and click on the timeline. You can see all documents, notes, events, tasks, calls, and emails, both by category and by date.

By “practice management” I mean the production of consistent, high-quality work product. There is no reason why your regular correspondence and basic legal documents shouldn’t be error free. Rather than hunting for precedents, you should standardize the forms and then automate their creation using a mix of formattable clipboards, merge templates, and document assembly tools. How many investments will let you “print money?” With document assembly you can get documents drafted in a fraction of the time it would take to word-process them, and then charge clients for the value of the services rendered, rather than the time.

By “practice management” I mean the capturing of five to ten additional billable hours per week. How many attorneys can account for every minute of their day when it comes to drawing up the time sheets? With a database that can track the time spent on calls, documents, notes, e-mails, research, as well as tasks and calendared items you will never lose another billable dollar. All items in the database can be timed and billed.

By “practice management” I mean the ability to find the document you need when you need it. All client documents are profiled by client and matter, available with a single click. Precedent documents are not sitting in some subfolder of your partner or secretary’s “my

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documents” folder. If they are profiled, they can be pulled up by category on the document list. You can even do a “full-text” search of the contents to find the appropriate document.

Finally, by “practice management” I mean mobility, the ability to hit the open road and take it with you. This may be done by synchronizing your calendar and contacts with a Palm OS or PocketPC device. It may mean downloading a subset of the database to your laptop before you head off-site. It may also mean accessing the complete database over the Internet.

Effective practice management will improve your life, the way you relate to clients, and your bottom line. If the catalog above matches your vision of legal practice management, I encourage you to “Stop, Look, Listen, and then Do.”

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