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### TechnoFeature: The Feature Package Revolution

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#### SYNOPSIS

Case Management systems have always been either too simplistic to cover "your needs" or too complex to cover your resources and capabilities at customization. There have always been armies of consultants ready to provide invaluable advice for a price -- a steep price. The revolution comes as enhancements to the leading case management products have laid the foundation for an emerging market of add-on products. These products can install in minutes or hours and replace dozens of hours of customization, leaving room in the budget for vital user training. In this article, case management expert Seth Rowland discusses the case management products that support "feature packages" and highlights some of the packages currently available. This article contains 1,775 words.

#### TECHNOFEATURE: THE FEATURE PACKAGE REVOLUTION

By Seth G. Rowland, Esq., <mailto:sgr@bashasys.com>  
(This article is a TechnoLawyer Exclusive.)

#### INTRODUCTION

This is not an article on which case management software to choose. There are many great choices, any one of which would immeasurably improve your firm's productivity. Whether you choose Time Matters <<http://www.timematters.com>>, Amicus Attorney <<http://www.amicusattorney.com>>, PracticeMaster <<http://www.stilegal.com>>, ProLaw <<http://www.prolaw.com>>, Client Profiles <<http://www.clientprofiles.com>>, LawBase <<http://www.lawbase.com>>, LegalFiles <<http://www.legalfiles.com>>, Practice Manager <<http://www.reallegal.com>>, CaseManagerPro <<http://www.casemanagerpro.com>>, PerfectLaw Software <<http://www.perfectlaw.com>>, Abacus Law <<http://www.abacuslaw.com>>, LegalEdge <<http://www.legaledge.com>>, or PCLaw <<http://www.pclaw.com>>, you will invariably be directed to either an in-house consulting department or a certified independent consultant to provide customization services.

Case management programs are invariably complex. Most cover

everything from the front office to the back office and everything in between: documents, e-mails, contacts, calls, notes, billing, and research to name a few items. Because of the scope of processes that are to be automated in a typical case management installation, it is recommended that users and administrators get trained in the program. Basic training, however, is almost never enough. Choices need to be made in the implementation -- hundreds of choices, sometime thousands of choices.

"WE ARE UNIQUE ... WE SHALL NOT CONFORM!"

Each firm has "different requirements." Each practice group within the firm has "special needs." Each user has "special requests." Accommodating these requirements, needs, and requests can be a full-time job for a firm database administrator or an outside consultant. In many cases, firms are unwilling to pay such costs. They are unwilling to allocate the time to plan a proper implementation or the money to hire a specialist. The result is often an expensive case management system that languishes under-used.

When I was in college, punk music was popular. It was the music of rebellion. We would all dress up in unique clothes, coif our hair in unique fashion, and dance in unique ways. We were all proud of our individuality. We were making our unique statement rejecting the standard norm of behavior. And yet, an interesting phenomenon happened at punk parties. It was very difficult to tell one punk rocker from another -- they all looked the same.

Case management implementations are much the same. In the details, each installation is different -- unique. The typical firm is full of "personalities" with their opinions and demands. And yet, when one reviews many installations, patterns emerge. This is true because of inherent similarities in the business of law ... the differences are more in style, than in substance. It is these similarities that enable case management software to be written in the first place.

There is a cost in being unique. Law firms should differentiate themselves on substance and quality of service. Document assembly systems built on core firm precedents can provide a clear competitive advantage. Higher quality documents, delivered faster, can impress clients and lead to repeat business. However, unique customizations in a case management system do not translate into competitive advantage, but rather are a cost that can be avoided.

#### PLUGINS -- FUNCTIONAL MODULES

If one looks at the "business of law," there are certain requirements that straddle all legal practice areas. These functions, such as calendar, rolodex, task lists, case files, and notes are usually handled by the core case management database engine. Beyond the core engine are what I will call plug-ins and functional modules. These are items typically handled by separate programs, but which can be "integrated" into the core engine or can share data with the core database. Document management, e-mail, billing, and accounting fall into this category.

Beyond these items, there are gaps in many case management

offerings. These gaps can be filled by user or consultant customizations of the software. For example, the mail record in Time Matters can be adapted to serve as the foundation of an integrated record room management module. The document record in many systems, with its ability to profile scanned images, can be used to serve as an integrated litigation support system. Other modules can be used for generating file pocket labels. Other plug-ins can provide links to MapQuest.com for driving directions as they relate to a particular contact. These enhancements further the business of law without being unique to any particular practice area.

#### MICRO-VERTICALS -- PRACTICE SYSTEMS

Many a firm has looked at the "default" software installation and said "not for me." Customization involves changing field names, and adding tables and fields and forms that are practice specific. The process of trial and error until your firm gets it right can be costly in time and money. Data can be orphaned as the firm tries new data structures.

The good news is that you are not alone. In this enormous legal market, there are hundreds of firms that practice in your area of the law. If law firms could somehow "share" their database customizations, all would benefit. If consultants would "collaborate" on development of practice systems and then offer them at a discount off the development cost, customizations could be implemented more quickly and profitably for everyone involved.

#### PRECONDITIONS TO THE FEATURE PACKAGE REVOLUTION

Software companies are run like business; they depend on economies of scale. The larger the potential market for a feature enhancement, the more likely that enhancement will be implemented in the core product. Unless and until there is a sufficiently large user base for a functional module or a practice system, that system will not be implemented. Each firm desiring such a module or practice system will be required to individually underwrite the cost of development.

To bridge this gap, a number of case management vendors have enabled "packaging" of enhancements or offer area of practice specific "practice packs," "practice libraries," picklists, area of practice templates, or model screen layouts to shorten the development time.

-- PracticeMaster features the creation of "Area of Practice Templates" -- forms created for specific areas of practice to collect and manage information. The base system ships with several basic types. PracticeMaster enables you to export from one database templates of forms with custom fields and custom tables and import them into another database.

-- Amicus Attorney V features the creation of "Practice Packs" that store the settings of custom contact fields and custom case file fields, document templates, precedents, form libraries, and configuration settings. A single database can store many practice areas, with the custom fields changing depending on the designated type of matter or contact. These Practice Packs can be imported into a client database. Amicus Attorney X has completely new custom

forms and tables with a full form designer.

-- Practice Manager offers special modules for Legal Services, Asbestos, Claims, Professional Cost Auditing etc.

-- ProLaw has practice libraries, with standard screens and layouts that can be used as a starter kit in configuring an implementation. These layouts often have to be tweaked.

-- Client Profiles features a "Gold Database," which contains collections of configurations and screen layouts used for different practice areas.

-- Lawbase features design templates and picklists, with default settings for different practice areas.

-- Time Matters ships with multiple property files to set "defaults" based on your firm's primary practice area. But then, it goes the next step by offering a robust "feature package" utility for importing and exporting customizations <<http://www.timematters.com/products/timematters/feature/featurepackages>>.

Time Matters has gone the farthest to encourage the creation of a free market for "feature packages." It enables you to package and export thousands of customizations covering every aspect of the database, from form design, to triggers, to reports, to merge templates. There is almost no customization that cannot be exported into a "feature package" and then imported into a customer's database.

#### NEED FOR PROTECTION

Time Matters Software has taken the next step to encourage the development of a market for these "feature packages." It allows developers to "protect" their work product by "locking" the customizations in the package by password or serial number. Amicus Attorney offers similar protections. A Practice Pack can require a password for import and a separate password for exported to protect the work product from unauthorized copying.

Because these protections are missing in other case management software, the use of model templates and layouts is often limited to consultants who use their own model templates for competitive advantage when bidding on client customizations. Practice packs are used by consultants to do their work in less time, but are not released to customers of "other consultants" because of the ease of copying.

#### FOSTERING A "MARKET"

Several years ago, Bob Butler, the Founder and President of Time Matters Software, had a vision of independent consultants developing custom modules for Time Matters and selling them at the company store.

The first step involved the development of a robust feature package utility; the second step required leveraging the talent of hundreds of authorized independent consultants by offering them "shelf space" in the Time Matters store.

Today, you can visit the store and find a variety of feature packages <<http://www.timematters.com/store/category/?cid=52>> for civil litigation, personal injury, elder law, and

general litigation practice. You can also find modules for handling calendaring and dates, managing your record room, and litigation support.

A quick survey of the Time Matters consultants shows the following with feature packages for sale or download.

-- Out of the Box Developers <<http://www.otb-dev.com>> offers practice templates for personal injury, insurance defense, and general litigation.

-- Premier Software <<http://www.premiersoftware.com>> offers a civil litigation package and an elder law package.

-- Basha Systems <<http://www.bashasys.com>> offers a record room management system module and a litigation support module. (Disclosure: I work for this company.)

-- Esquire Consultant Group <<http://www.esquireltd.com>> offers an ETM e-Law Link to synchronize case information and court dates.

-- Law Office Systems <<http://www.losinc.com>> offers an enhanced calendaring module for handling special dates.

-- Systems InDesign <<http://www.systemsindesign.com>> offers customized reports package.

-- Active Practice <<http://www.activepractice.com>> offers dynamic training manuals.

-- Business Assistants <<http://www.businessassistants.com>> has linked its own Access database to enhance Time Matter's ability to track case and medical costs.

-- Information Technology Professionals <<http://www.itprosusa.com>> offers a national set of county lookup lists to use with Time Matters.

## CONCLUSION

The future revolution will include more specialized and targeted feature packages. Groups of users can "recruit" a consultant to develop a package, underwrite its development, and potentially share in the profits. It is a matter of time before the other software companies recognize the value of "feature packages" and offer similar capabilities to provide greater services to their user-base.

This revolution will increase the value of case management databases to their users, and paradoxically, increase the perceived value of consultants to these lawyers as they recognize the value of database enhancements. We will all benefit from this free market.

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## ABOUT THE AUTHOR

Recovered attorney, Seth Rowland, was named TechnoLawyer Consultant of the Year in 2002. He has written and spoken extensively on law practice automation. He is a nationally known technologist and Time Matters Authorized Independent

Consultant whose company has helped many law firms automate their practices with Time Matters. His company, Basha Systems, has built and sells several feature packages for Time Matters, including: Litigation Files Management System, Record Room Management System, and Blumberg FLIP for Time Matters <<http://www.bashasys.com/products/index.html>>. You can contact Seth via e-mail at or telephone at (914-827-9173).

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