

The Lawyer's Outlook: Bill More, Work Smarter

How fourth-generation Outlook Integration enables law firms to bridge the gap between the way lawyers work and how critical law firm data is collected, managed and shared



Introduction

Sasquatch, also known as Bigfoot, is an alleged ape-like creature purportedly inhabiting forests across North America. Though its existence has never been proven, it has been described as ranging between 6–10 feet tall, weighing in excess of 500 pounds and covered in dark brown or dark reddish hair. Despite reports of sightings by many eyewitnesses over a number of decades, the scientific community considers Sasquatch to be a hoax and does not support its existence

Likewise, the legal industry has had its own “Sasquatch” – in the form of a case management system that lawyers will actually use. Many legal administrators have heard of these systems, but few have borne witness to their firm’s attorneys actually operating within the case management environment on a daily basis.

Fourth-generation Outlook Integration technology, employed by the top case management systems, takes the issue of “user adoption” by attorneys and effectively removes the barriers that commonly impede the capturing and sharing of critical data across the firm. Today’s systems are easy-to-use, seamless and allow attorneys to continue working in the environment where they already spend a large portion of their time – in Microsoft Outlook.

In the past (and in some cases even today) developers of these systems have attempted to “push a large rock up a steep hill” by insisting that lawyers log into an entirely new interface in order to participate in the system. User adoption struggles as law firms investing in these systems find attorneys are reluctant to embrace new processes that go against the way they are already accustomed to working.

Innovators in legal technology acknowledged that there must be a better way, and have focused on designing “smart” case management tools that integrate tightly with the Microsoft Office suite. By deploying a stealth approach to collecting case and matter data that seamlessly fits the way attorneys work, these technology leaders have succeeded in tailoring their systems to the natural daily workflow of today’s law office.

As a result, the industry has seen an increase in user adoption, as well as a significant improvement in the success rate of legal case management implementations.

The Lawyer's Outlook – A History

According to ILTA’s 2009 Technology Survey, 94% of law firms are now using Microsoft Outlook/Exchange as their primary email platform. In a legal industry once dominated by Novell’s GroupWise

and, to a lesser extent, Lotus Notes, it is by no means a stretch to declare Microsoft Office as the de facto “standard” among personal information managers.

By positioning itself as the market leader in productivity software, Microsoft has become an attractive choice for IT Directors for a variety of reasons. The user interface is familiar and intuitive to many, helping to control training time and cost. Outlook and Exchange work very well together, cutting down on IT involvement in configuration. Outlook 2007 raises the bar with regards to organization of Email, Contacts and Calendar, making it easier to organize and delegate. And, despite Microsoft’s reputation on the issue, Outlook 2007 includes strong security abilities and features.

So what is the advantage of Outlook to a law firm, as opposed to an accounting or an engineering firm? Out-of-the box, there really isn’t much of an advantage, nor should there be. It has never been a part of Microsoft’s business philosophy to develop versions of Outlook that meet the needs of individual vertical markets such as legal.

Instead, Microsoft chooses to release broad-based applications that meet the needs of organizations across the board, while relying on their partners to develop the add-in functionality to help fine-tune it to the needs of industry-specific organizations such as law practices. It is a testament to Microsoft and their engineering that they have built an application such as Outlook that has such a high degree of applicability across so many individual markets, and that it was built on an open architecture that allows legal technology partners to embed case management technology which enables the software to perform functions directly suited to a legal practice.

The rise of Microsoft Office in law firms has not gone unnoticed by developers of legal case management systems. In fact, those

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companies leading the charge would likely agree that the most important component of any case management system is its ability to integrate with Outlook and the Microsoft Office suite. While it is estimated that attorneys and their staff spend greater than 70% of their workday with Outlook open on their workstation or within their mobile device, case management companies continue to develop integration technologies that allow users to work as much as possible within this environment in which they have grown accustomed.

Outlook Integration -- defined

At its most basic level, Outlook Integration refers to a case management system’s ability to automatically transfer information back and forth seamlessly between a case management system (CMS). A good system that has been tightly integrated with Microsoft standards will offer bi-directional synchronization, meaning that if an attorney or paralegal enters an appointment in Outlook, it will automatically be updated within the CMS and vice-versa. This is referred to as one-time entry.

Now considered to be in its fourth generation, CMS/Outlook Integration technology has gotten stronger and stronger, with the best systems representing a true “Outlook client”. The current generation focuses on ease-of-use, allowing for a seamless user experience. The beauty of these systems lies in the capture of data via day-to-day

workflow, allowing users to build the case information database while eliminating redundant data entry into separate systems. Case-related information is aggregated in one centralized database for answers to questions.

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Now let’s take a closer look at the four main functions of Outlook that are essential to any legal organization: Email, Calendaring, Contacts and Tasks.

Email: It is not uncommon for attorneys to receive upwards of 250 emails in a single day, and law firms continually struggle with how to handle the volume. If you talk to an IT Director at any law firm, they are in a constant struggle with the sheer size of the Exchange database as it builds up. By being able to take data and make it available to everyone involved in the case, and not just the attorney who has access to that inbox, you’re able to make true collaboration possible on cases and matters. That is where the case management system comes in.

When users send or receive an email message, they have the ability to

“associate” the message to a case or matter. Without this association, an attorney may be able to see his/her personal emails, but there would be no way to share that message across the office or to get a “case perspective” view of all emails associated to that case or matter. Associated emails are then transferred from Exchange to MS SQL database records, becoming part of the integrated case management information.

Documents attached to emails have also presented enormous challenges for law practices struggling with organizing mountains of information. A good case management system addresses this issue by prompting users to store the document within a case file.

Another major issue with email involves time capture, which will be explored later in this document.

Calendaring: Perhaps the single most important function for attorneys is the Calendar, which allows them to schedule appointments, manage activities, review available time and invite others to meetings. Especially important with today’s reliance on mobility is the ability to synchronize calendars with a handheld mobile device such as a Blackberry, iPhone and Windows Mobile devices.

CMS integration with the Outlook Calendaring module is highly beneficial, as it is in email. Calendar entries associated with a case or matter create the foundation for a firm’s docketing system. Outlook Integration means once appointments are associated, the firm can access a case perspective and generate docketing reports.

Contacts: The Outlook card file is the modern day “Rolodex” for law firms, the place where lawyers, paralegals and secretaries enter all client-related data. Without Outlook integration with a CMS, each individual’s card file becomes an

island of important contact information that cannot be shared with anyone else in the firm. Duplicate card files, with varying degrees of accurate contact information, will exist across the firm. And if a contact’s information needs to be updated, it can only be updated one card file at a time.

CMS companies overcome these issues by creating a firm-wide “related party database”. When a contact’s phone number or email address is updated within the master database, the change is reflected in every user’s card file, so everyone has the most up-to-date contact information for each client.

Outlook Integration gives users the ability to organize contacts by party type or categories (plaintiff, defendant, etc.). Users can associate the party with one or more cases, giving administrators the opportunity to search the system to easily identify parties associated with certain cases or matters, and the ability to establish the relationship each party has to a case. In addition, once that information is captured, a good case management system will automatically conduct a conflict of interest search.

Tasks: Law offices use Outlook tools to create To Do items or packages for all lawyers and support staff assigned to a case or matter. Today’s case management systems allow To Do management (also referred to as tasks, ticklers or critical date reminders) to be fully integrated with appointments, documents and other components of the system. With Outlook Integration, law offices have the ability to manage To Do items for individual, group, practice area or firm-wide reporting.

Piecemeal vs. the Real Deal

An all too common scenario still seen in some law firms today is the insistence to forego a CMS in favor of an inadequate combination of Outlook, Word and a document management application. Such a

system leaves too many holes in the process.

Outlook and Word are excellent programs, but they are not designed as “collaboration” tools. And document management systems, once a good step for law firms, only provide a fraction of the benefits offered by a good case management system.

These systems also do not allow you the ability to assign workflow or to create standardized processes and procedures to follow.

In short, Outlook is a great “personal” information manager, and it does a great job of expressing everything that is going on in the workday of the individual professional. Where it falls short is being able to provide the “big picture” of what is going on in the firm.

Embedded case management technology into the Microsoft Outlook environment allows firm management to truly get the big picture – what people are doing, when they’re doing it, where they’re going to be and what the resources are so they can make adjustments in overall scheduling. That’s a piece that Outlook alone doesn’t bring to the table, and that’s also the component that allows even the most disorganized law office to become an efficient and collaborative organization.

What Every Lawyer Wants to Know (and Isn’t Afraid to Ask)

We’ve examined some of the benefits of case management/Outlook Integration from a firm perspective. So how do you answer the question “what’s in it for me?” (“Me” referring to those individuals whose input is most essential to the success of any CMS - the Lawyers)

A case management system allows attorneys to better leverage all of the resources that are available to them within the firm. An associate, for example, may

be able to lend a hand by helping to cover some important agenda items, but only if they have access to the necessary information. If an attorney is out of the office and a client calls with a request, someone else within the firm would be able to easily access the case or matter information via the case management system and quickly fill the request. In the past, such client requests could possibly take 2-3 days to fulfill. This type of response can help relieve stress, as well as go a long way towards increasing client satisfaction.

Case management systems give attorneys reminders in a wide range of instances such as case activities, time capture, etc. These systems serve to make an attorney's life a little easier and a little less stressful. They can also be credited with helping to give attorneys an improved quality of life and better control over what's going on around them, in addition to increased billings. This all adds up to a potent combination for law firms to capitalize on.

Furthermore, finding of case and matter-related information is greatly improved. Attorneys quite often need to find something and find it quickly. Search functions allow attorneys to find things very quickly without having to comb through folders and subfolders on the network.

If You Can't Beat 'em, Join 'em

Microsoft Office 2007 represented a major redesign that offered a very intuitive user interface. At the same time, top CMS developers are focusing their resources on increasing "user adoption" of their products, mainly by making their use as seamless as possible.

In fact, many active contributors to case management within the firm (attorneys for the most part) almost never enter the case management environment, remaining instead within the Microsoft Office environment all day. The name of the game here is comfort – allowing users to stay in

the environment they are comfortable in (Microsoft Office) while remaining active contributors to the data collected within the case database.

By focusing efforts on creating as seamless an experience as possible, CMS developers avoid a "changing of the culture" and instead, follow the path of least resistance by allowing these users to continue working in the environment they choose. This trend is likely to continue in future generations of case management.

If a Tree Falls in the Forrest . . .

Or, put another way, if an attorney spends 10 minutes drafting an email response to a client inquiry and doesn't immediately enter his/her time into the time entry system, will it be billed? The answer to this is, all too often, no.

At the base level, any good case management system should have the ability to prompt timekeepers for time entries when they initiate or complete certain types of tasks or events. Don't even waste your time looking at a system that can't do that.

Many firms who successfully implement such systems see the biggest increase in billable time occur in their Outlook email. Many of attorneys are still not billing for their email time, and this represents a huge loss in billing potential for any law firm.

Let's look at it from a workflow perspective. A legal assistant creates a document from an attorney's dictation. The assistant clicks a button and sends it back with note saying "I need you to review this." The document shows up in the attorney's review queue. The attorney reviews it, annotates it and saves it as a new version, all within the case management environment. Then the review is marked complete.

Two things happen: 1) the assistant is promptly notified that the document has been reviewed, and 2) the attorney gets prompted to make a time entry for

his/her efforts. That alone is going to help accommodate for a significant increase in billing. At a secondary level, because the case management system has, or should have, the ability to track all of the activities, the law firm has a nice journal to review during billing to match up those activities with the information that show up on the WIP report for the month.

That is a specific example of how law firms increase their bottom line with a fully integrated CMS. Generally speaking, law firms who implemented such systems have reported an increase in billings on an average of 10-12%, with some firms even reporting much higher percentages. Firms often notice a significant year-over-year increase without any justification in terms of their caseload.

Conclusion . . .

So what's next? It appears much of the current trends will continue. Outlook isn't going anywhere any time soon. However, the way in which case and matter information is accessed will change. As mentioned earlier, mobile computing continues to be a driving factor in new technology. Giving lawyers the ability to access case management data via their handheld devices is the future, and systems are moving in this direction.

As you can see, the "Outlook" is bright for lawyers and their staff having the ability to collaborate on cases through the use of the case management interface or the Microsoft Office / Outlook system. Lawyer adoption concerns are eliminated because they are already using Outlook. The true benefits will exist for law firms who invest in case management systems that transform it into the Lawyer's Outlook. ☺

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