

Kaufman Law Group chooses Legal Files as its client extranet

Background

Located in Northbrook, Illinois, the Kaufman Law Group serves privately held businesses throughout the Chicago area in the retail, manufacturing, distribution, contraction and professional sectors, as well as executives, professionals and their families, concentrating in estate planning and wealth preservation, real property, privately held businesses and retirement plan design and administration.

Early on, the Kaufman Law Group recognized the advantages of using Legal Files case management software. "Ten years ago, we saw the value immediately," attorney Jay Kaufman said. "We knew the firm would grow and that would require a strong foundation in technology." As one of the first firms to go paperless, it began to scan every piece of received mail and attach it to Legal Files mail log. "The payoff was huge—instant access to any information you needed from anywhere."

The Challenge

"What we do generates a lot of paper. When we finish a pension plan, or complete a merger and acquisition or a real estate transaction, we end up with a book of materials. We found ourselves killing a lot of trees and we found ourselves paying a lot of Federal Express bills to send and track documents."

Kaufman decided to launch a client extranet, a web/browser-based application that only their clients and the Kaufman legal team can access. All documents related to the transactional matters handled by the Kaufman Law Group would be posted and made instantly accessible to authorized users.

"We used another product for a short while," Kaufman said, "but it didn't make sense to use two systems. We were already using Legal Files for our case management system, so why increase labor costs to upload and post documents using an entirely separate system. Over time, the economics just made sense."

The Results

Introduced to clients in conjunction with the launch of a new firm web site, the Legal Files client extranet is available through a prominently placed hyperlink on the Kaufman Law Group site. Using a log-in on the web site, Kaufman's clients are able to access their files and documents using a secure, encrypted Internet connection, 24 hours a day, seven days a week.

"To date, most smaller law firms have not adopted the technology because of cost concerns or because they are not technology driven. Because of Legal Files, we are able to offer a client service that was once only available from a few, very large law firms."

Jay C. Kaufman,
Kaufman Law Group

Customer Profile

Kaufman Law Group

- Varied practice areas
- Serves privately held businesses throughout the Chicago metropolitan area
- Early adopter of technology

Challenge:

- Share information online with clients and other professionals
- Require secure access, available 24/7
- Desire an affordable solution

Solution:

- Leverage client extranet capabilities of Legal Files
- Extend information that is already available without additional effort
- Provide clients with access to their files and documents over a secure, encrypted Internet connection

Results:

- Improved client service
- Competitive with larger firms
- Best technology at best value

The Legal Files extranet provides the firm's clients with real-time access to secure matters, documents and data. It also enables the Kaufman Law Group to collaborate with its clients and, with their permission, their professional advisors including accountants and investment and insurance advisors, providing a new level of synergistic and integrated planning. "It enriches the interaction between your team and ours," Kaufman tells clients.

"We're phasing it in and determining if we want to implement other features," Kaufman explained. "Right now, we're providing read-only access to documents and it seems to work very well. We post a document, send an e-mail to let clients know it's there and, if necessary, remind them how to access it. It's better than overnight (delivery of documents) because as soon as we finish the document, it's immediately accessible to the client."

The Technology Behind it

Kaufman's client extranet is powered by the "client mode" of Legal Files web/browsed-based based application. Providing anytime/anywhere access to data, the web/browser-based version of Legal Files also reduces the need for expensive IT resources since it is easy to deploy, maintain and upgrade. Legal Files' client mode provides law firm customers with the underlying functionality for a "client access" portal.

This Legal Files technology is also popular with corporate and government customers who are often prohibited from installing any application on their personal computers or laptops. Offering a zero footprint, Legal Files client extranet does not require end users to install any software.

The Legal Files client portal was designed to allow non-technical staff to manage files and documents to share with clients, as well as security management to control who can see the files and documents. Security rights are specified within Legal Files by the Kaufman team and security changes take place immediately. The Legal Files client extranet software is hosted internally on the Kaufman Law Group network.

Bottom Line

"Client reaction has been positive," Kaufman said. "They love the convenience of it. For example, we'll complete an annual review and update of an estate plan and post it. No matter what time of day or their geographic location, if a client says, 'what was that provision?' or 'who did I leave that to,' it's accessible. Clients can stay on top of what we're doing for them."

Kaufman continued, "The Legal Files client extranet distinguishes us from other firms. Smaller firms typically don't offer this kind of service. Now, we can provide the resources large firms do, and still provide more personal service."

Plus, he added, "The amount of real estate we need for filing has dramatically decreased. Three filing cabinets—that's all we have because that's all we need."



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