

## From chaos to order: Locks Law Firm chooses Legal Files

### Background

From offices in Philadelphia, New York City and Cherry Hill, N.J., Locks Law Firm, with a team of 23 lawyers, represents clients both nationally and internationally. Practice areas include personal injury law suits, mesothelioma, pharmaceutical litigation, medical malpractice, product liability and consumer class actions.

### The Challenge

“We had a very segmented standard operating procedure for our firm,” explained Chris Myers, MIS-IS Director at Locks Law Firm. “Busy with everyday operations, no one had really stopped to establish a uniform process. One person had tried to put manual procedures in place, but it wasn’t very successful. People were still asking themselves: What do I do with all that mail? What do I do with that stack of depositions? What do we do with these closed files? I decided to take an IT approach, find a system that would help us change chaos into order; a system that everyone learns, that every new employee learns, so that we can keep our procedures going and our best practices in place.”

Having just implemented Juris to automate and standardize the accounting side of things, the firm’s selection of Legal Files early in 2008 was an easy one. “It was a great time to follow up with a legal database and document management system,” Chris said. “Another law firm had recommended Legal Files, and when we saw Legal Files’ ability to talk to Juris, that clinched the decision for us.”

### Juris/Legal Files Integration

The Legal Files integration with Juris is unique because it offers the most seamless solution available. Designed to provide maximum flexibility to law firms using both Legal Files and Juris to manage their combined front and back offices, the integration allows each customer to determine how the two applications work together and specify which users have access to which information.

The two programs share critical information, and users may view information from both sides, through either application. When combined, Legal Files and Juris offer a powerful and integrated case management and accounting solution—without the need for redundant data entry.

(more...)

*“There aren’t too many programs which take client suggestions and implement them into the application as quickly as Legal Files does.”*

Chris Myers, MIS-IS Director  
**Locks Law Firm**

### Customer Profile

#### Locks Law Firm

- Personal injury, mesothelioma and class action lawyers
- 60 Legal Files users
- Implemented at New York and Philadelphia office; currently implementing at New Jersey office

#### Challenge:

- Lack of uniform, standardized procedures
- No comprehensive process to capture, track and analyze data
- Multiple locations, multiple people need to work the same files

#### Solution:

- Implement Legal Files, taking an IT approach to standardize firm processes and institutionalize best practices
- Standard and custom reports provide level of information never thought possible
- One, centralized system provides up-to-date, secure access to cases from any office location

#### Results:

- Chaos to order, encompassing entire file/client lifespan
- No more fights over paper files!

## The Results

Locks Law Firm has successfully implemented Legal Files in its New York and Philadelphia offices and will be rolling out Legal Files to its New Jersey office very shortly once a data conversion and training have been completed.

“It’s easy to use,” Chris said. “We use it like a filing system primarily. But instead of file folders on a shelf—one for correspondence, another one for records, etc.—it’s electronic. We used to have a Windows folder for each client, but that only takes you so far. Now, the final version of everything goes into Legal Files and it’s all searchable and retrievable,” he said.

“Just this week, I did a search across hundreds of files for a specific drug name that’s been in the news recently because of a possible link to a loss of smell. I wanted to determine if any of our prospective clients had reported this type of concern. It’s really amazing that you can go back days, even months and search countless records.”

Locks Law Firm uses Legal Files to manage prospective client files, as well as all active client cases. Files can include a history of all communications (documents, phone logs, e-mail, reminders, etc.) related to the prospect, as well as a listing of staff or other related individuals. Prospective client files can be converted to legal case files at any time without the loss of any data including documents.

“We’ll get a call from someone who’s visited our web site,” Chris said, “We open a file, capturing all the information we need. That file may be routed to an attorney to review and then routed to an office manager for it to be converted to a legal file. All the information that is captured from the beginning of that process is still there and is ‘live’ for any legal assistant or attorney to manage.”

## In-depth Reporting

“My favorite thing about Legal Files is the reporting,” Chris said. “I taught myself Crystal Reports and between my own custom reports and the reports already in Legal Files, well, I just never thought I could accomplish that kind of data analysis. The amount of information that you can track and analyze using Legal Files is amazing. Everything you need is there in Legal Files and if for some reason it isn’t, or you want to change something, we just add a custom window.”

Legal Files has also increased productivity in the offices, according to Chris. “We don’t have anyone competing over the same folder any more,” he said. “A secretary in New York can update an address. An attorney in Philadelphia can log a phone call with an opposing counsel. A legal assistant can request medical records and create follow-ups. All with Legal Files. All of them have access to the file, all of them can work on the file at the same time and no one is hanging around the same manila folder waiting for their turn.”

## Phenomenal Training and Awesome Support

In addition to the software, Locks Law Firm also invested in training and is taking advantage of the annual maintenance and support offered by Legal Files Software, Inc. “The onsite training was phenomenal,” Chris said. “It really got us ready to go and Support has been awesome. I’ve also used the manuals and [the application’s online] Help. There’s nothing I couldn’t find.”

## Bottom Line

“Legal Files is the one-stop shop for everything to do with your client. Everything you need is there,” Chris said, “and if not, you can simply add it.”

