Legal Files

Managing what matters to you.

Halley, Talbot, & Smithton chooses Legal Files to manage its statewide personal injury/workers' compensation law practice

Background

The Halley, Talbot, & Smithton Law Firm provides legal support state-wide in Oklahoma for people involved in auto and truck accidents, workers' compensation incidents, medical malpractice, etc. An electronic file/case management system seemed ideal for this type of practice.

"We had a file management system, but no one was using it," explained Danny Talbot, the partner who handles all the workers' compensation cases for the firm. "It was essentially a paperweight. When you tried to use it, it wouldn't work right or it didn't work the way we thought it should."

That experience led the firm to a homemade system which used Outlook folders to store e-mail and calendars and Window Explorer folders for everything else.

"It wasn't easy to use or easy to maintain, and it was not very efficient," Talbot said. "It was very frustrating. You needed to go to different places to search for documents or contacts, or search through millions of email. The whole office was sharing one calendar. I couldn't just look at my calendar. If you were looking for someone's contact information, you didn't know if you were going to find it in the global list, or in assistant's personal contact list. And, even if you did find what you were looking for, you didn't know if it was the correct information or even the most up-to-date information," he said, "and you certainly couldn't tell the status of a case."

The Challenge

Those experiences "left a bad taste in our mouth," Talbot said, explaining the firm was very cautious about trying another legal management system. However, experience with Legal Files at a previous employer and positive comments from a law firm already using Legal Files helped prompt Talbot to see "whether Legal Files would work for us, and how it would work."

Talbot said, "When I joined the firm a few years ago, I knew right away that we could be more efficient if we switched to Legal Files. But the firm had invested quite a lot of time and money in making the old system work. In time, I was able to convince the other partners that making the change would benefit everyone. We looked at other applications, but none seemed to be as user friendly as Legal Files."

Customer Profile

Halley, Talbot, & Smithton
- Full service law firm providing representation to individuals from two offices; one in Oklahoma City and one in Woodward
- Practice areas include: trial practice, personal injury, workers' compensation, product defects, oil field accidents, environmental and toxic litigation, and auto/truck accidents

Challenge:
- Replace inefficient, homemade file management system
- Overcome concerns of attorneys and staff members who had bad technology experiences
- Provide full case management capabilities

Solution:
- Implement Legal Files Software for entire firm
- Create custom windows for special workers' compensation needs
- Create document templates and use Legal Files document assembly for faster & easier document production

Results:
- Readily access accurate and most current information
- Provide updates to clients more quickly
- Handle more cases, more efficiently

The Results

Efficiency is the name of the game for the growing firm. Now that everything related to a file—deadlines, contacts, documents, e-mails, to-do's—is in one place, staff members and attorneys are finding themselves more efficient than ever, Talbot said. "Using Legal Files has made it easier to serve clients from two office locations and streamlined the communication process between our employees," he said.

Legal Files is now the firm's "all-in-one" system, Talbot said. "I use Legal Files and I have pretty much all I need right there—whether it's my calendar, documents, contacts, e-mail," he said. "I open Legal Files when I walk in the door in the morning and I don't shut it down until I walk out the door at night. Anytime somebody calls, I have immediate access to everything in his or her file. I love it. I don't know what I'd do without it."

Using Legal Files in a workers' compensation practice

Legal Files is designed to handle any type of case; however, Halley, Talbot, & Smithton found that Legal Files' built-in document assembly system was especially helpful for its type of practice.

"Handling workers' compensation cases in Oklahoma is very form intensive," Talbot said. "Creating document templates within Legal Files for those forms, and then allowing the system to pull in anywhere from 75 to 95 percent of the information needed to complete those forms has made the entire process so much easier, and so much faster for us."

However, Talbot said, he couldn't help but "tweak" the program using Legal Files ' do-it-yourself custom window functionality which was accomplished in-house, without any technical or programming ability. One type of customization offered is custom windows functionality, which provides the ability to design windows that meet specific needs.

"In 90 percent of our cases, the insurance company will send weekly checks for the insured directly to the law firm representing him or her," Talbot explained. "So we created a custom window in Legal Files to track and manage those for our clients."

 Another way Talbot customized Legal Files for the practice involved disability rates. "We created a second custom window, and once we find out and enter the wage rate on the window, Legal Files automatically calculates the disability rate for us. It was simple."

Finding the Right Solution

Talbot offered several suggestions when selecting a system. "Find a program that is tested, that has been around for years. Second, find a program that has a good following; that has long-time customers, but is still innovating so it is attracting new customers. Finally, don't buy the cheapest thing because," he laughed, "typically that doesn't work out so well."

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