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Practice Management

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Make the Case

Follow These Top 10 Tips to Build a Case for Case Management

Savvy firm managers already know that computerized case management systems help reduce costs, make it easier for staff to share information and keep clients happy. You've seen hundreds of ads, read dozens of articles, downloaded countless demos, talked with other administrators about the successes they've experienced, and even attended a seminar on "Legal Technology for the 21st Century."

You've done your homework. A lot of it. So you know the enormous potential benefits from case management that await your firm. But does everyone at your office? How about the staff and attorneys who will use such a system every day? Do they share your enthusiasm? What will it take to get your partners' buy-in?

Because of its impact on your office workflow, a case management system is not an impulse purchase. And, usually, no single person makes the final choice. Before you approach your firm's top decision makers about the need to purchase case management software, you can arm yourself with the ammunition and information you'll need to convince them of its merits. While there are many ways in which these types of systems make life easier for everyone at your office, including yourself, the following

Revenue calculator

Like to work smarter, not harder? Use this calculator to estimate how much more revenue your firm could generate using case management software.

Enter the total number of people (timekeepers) in your firm. 20

Estimate the increase in minutes billed per day with the help of case management software. 15
(As a conservative estimate, enter 15.)

Enter your average hourly billing rate. . . $300

Enter the average number of billing days per month. 20

Total dollars in increased billings per timekeeper per month $1,500

Total dollars in Increased billings per timekeeper per year $18,000

Total firm dollars in increased billings per year $360,000

Productivity calculator

Ever had to turn down a case because of a lack of time or lack of staff? Use this calculator to estimate how much you can increase your organization's productivity with the help of case management software. See how your fees can grow.

Enter the number of attorneys at your organization. 10

Enter your average caseload 75
(average number of cases handled by each attorney).

Estimate the percentage increase in cases you could handle each year with the help of case management 10%
(As a conservative estimate, enter 10 percent.)

Enter your average fee netted for each case. $7,500

Total average increase in fees for each attorney $56,250

Total average increase in fees for your organization each year. . . .$562,500

"Top 10" tips can help you build your case for case management.

Tip 1.
It saves time on routine tasks.

Every firm has many repetitive tasks. Automating the routine is perhaps what case management software does best, and often provides your first-noticed efficiencies.

For example, when you open a particular kind of case, do you always do the same eight things? If so, rather than entering those tasks as separate To Do's or checklist items (the first of which is *remembering* to enter them at all), your case management program can automatically assign the tasks or deadlines according to your firm's guidelines or court rules.

You can also "trigger" tasks or items to launch when a case reaches key dates or phases. It's easy to set it up once and then let the program do the reminding from that point on with each new case or matter. Not only do you save time, but you also avoid losing time playing catch-up because someone forgot to assign a critical task. Plus, most case management programs use auto-fill entries on screens, including pick lists and drop downs. This makes fast work of keying in data. It also promotes better data entry because staff members choose from pre-set options on the lists.

By using your case management program's document-assembly system, where master document templates merge with names, addresses and other previously entered case data, you'll slash the time it normally takes to produce correspondence, forms and court documents. You can reasonably expect to reduce document production time by at least one-third. In addition, some programs can help you quickly compile a pleadings index, shaving hours off this time-consuming task.

Tip 2.
It saves time — no more looking for physical files.

Without a doubt, one of the biggest "time vacuums" law offices deal with is the time spent looking for the physical file. "Has anyone seen the Jones file? I need it right away." Then another hour goes by until the file finally shows up. As a result, all the people dragged into the search wasted their precious, billable time. And the person who needed the file "right away" is now behind schedule. Sound familiar?

However, after you've been using case management for a few months, your "electronic" files will grow, and you'll undoubtedly find your need to refer to the physical files greatly diminishes. That's because now all the pertinent notes, phone messages, e-mails, documents, names and other case information you need can be found and reviewed in seconds, as opposed to minutes or hours. Simply multiply those timesavings by each staff member's hourly rate or wage, and over a year's time that probably equates to the price of the software.

Tip 3.
It makes training staff easier.

The checklists or task wizards you implemented in Tip 1 will provide a step-by-step guide for instructing current

and new staff on how you want certain types of files handled. Additionally, your case management system should be flexible enough for you to integrate your office-workflow procedures into the program's structure.

As a side benefit, you'll get greater consistency among departments or practice groups. If staff members transfer from one group to another — or cover for someone else in another area from time to time — it's easier for them to make the transition. They come to their new assignment already knowing the basics.

Tip 4.
It captures more billable time.

Many case management systems provide their own time-tracking modules or link with popular time/billing programs. Through the use of automatic "stopwatch" timers that record time spent on various case activities or through "activity logs" that help recreate a day's actions, timekeepers can make more accurate time sheets, which can be completed faster. The end result is that time tracking is simplified and done "as you go," so timekeepers more easily capture their time, spend less time manually recording their time and are free to spend more time on billable activities.

Check out the "Estimate your ROI" calculator at the end of this article to see how much more productive your staff can be. A few minutes here and there really do add up.

Tip 5.
It lets you handle more cases.

Since first introduced in the 1980s, computerized case management programs have proven to help staff handle greater caseloads, especially if your firm handles any cases on flat- or contingency-fee arrangements, where efficiency is richly rewarded. It's not uncommon to see caseloads jump 20 to 40 percent after the first year of use.

This isn't just hype. Ask the case management vendors you're considering to give you names of their customers that experienced similar successes. They'll be happy to supply you with references you can check, and then you can use those "real life" testimonials as corroborating evidence. Remember, you can also use the "Estimate your ROI" calculator to see how adding just a few cases per lawyer or support staff can substantially increase your fees.

Tip 6.
It protects institutional knowledge.

The wealth of information about your clients, cases and office procedures that's stored in your paper files and your employees' collective minds is your firm's knowledge base — your firm's property. And if someone leaves the firm for some reason, you don't want all the information relating to those cases to walk out the door as well.

If your lawyers and their support staff do even a moderately good job of tracking case activities and notes in your case management program, their files will contain enough background information so new employees can reduce down time reviewing cases from months to days. Bottom line: Your new hires can hit the ground running.

Tip 7.
It gives managers the reports they need.

When reviewing case management products, everyone asks, "What's in it for me?" For managing partners, group supervisors, department heads and other people who like to know what's going on from a big-picture perspective, the No. 1 answer is reports. At the push of a button, they'll have access to case status, profitability and workload reports. Plus, they can see reports on time spent or fees billed, sorted by client, case, date range, lawyer, department, etc. In short, your case management program will provide the meaningful data managers need to help them spot trends and manage proactively.

You can also "trigger" tasks or items to launch when a case reaches key dates or phases. It's easy to set it up once and then let the program do the reminding from that point on with each new case or matter.

Tip 8.
It helps you provide better service.

If it's true that information is power, then case management software gives you the power to provide outstanding service to your clients. With a case management program, you'll have at your fingertips the information you need to competently and quickly respond to their inquiries. And you won't have to leave clients on hold, or call them back, thus initiating many rounds of phone tag. But no matter how you come in contact with your clients (in person, correspondence, phone, fax, mail, e-mail, etc.), they can have a consistent, helpful experience from everyone at your office. The following true story illustrates the point.

A supervising lawyer took a phone call from a client regarding a case being handled by another of the firm's lawyers. The supervisor wasn't assigned to the case, and in fact, had no prior involvement with the matter until that very moment. With the client on the phone, the supervisor opened the client's file in the case management program and reviewed the file's transaction log, which contained a history of every event, task, phone call, e-mail, note and document that had been entered throughout the life of the file. The supervisor easily found the information needed to answer the client's inquiry, and at the end of the call, the client said, "Thanks, we always get great service from your firm." It may be worth buying the software just to get a comment like that.

Tip 9.
It guards against missing deadlines.

It's easy to make mistakes or forget a deadline. Lawyers can miss a really important statute date. So, no list of case management benefits would be complete without mentioning how these programs help track deadlines, and then remind you over and over so you don't miss them.

Beyond filing dates and jurisdiction-related deadlines, your office may also have its own protocols or best practices that it wants to enforce and manage. Additionally, some states require a dual or back-up calendaring system, and your case management system may fulfill this requirement (which might lower your professional liability insurance costs, too).

Tip 10.
It helps attract the best clients and staff.

More and more, law firms are highlighting in their marketing materials and Web sites how technology plays a key role in their practices. The use of technology is touted as a competitive advantage to attract prospective clients and recruit new lawyers.

Mentioning that you use case management software communicates more than the fact that you simply have a bunch of computers in your office. It's stating that your firm knows how to use computers efficiently and has a process in place to handle your office's knowledge and resources. It's stating that you're a technology leader, dedicated to client satisfaction. And that's a message that both your future clients and employees want to hear. ✜

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