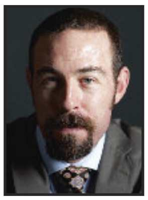
With case-management software, it's all relative

Your life revolves around your cases. So should your case-management software


Cooper

By Miles B. Cooper

The receptionist buzzed. "A Mr. D____ is calling about a referral." I ran my mental rolodex. Like many people, I'm terrible with names. But I remember details. Once things click, I remember you went to UCLA, you rowed in college, and you had a case involving the Dodgers. My mind is relational. But I need a jumpstart on the relationships.

Relational databases and case-management software

How does this lead into case-management software? Because the software is relational. It is referred to as case-centric software (or matter-centric, where a "matter" is what we know as a case). The software is built so you can click on a case, see who is associated with it (opposing counsel, judge, assistants, experts, clients, defendants), click to access their contact information, and easily find deadlines and associated events. Every entry revolves around the case. You can also associate contacts with multiple cases. When you click on an opposing counsel's contact card you can see all the cases he has had against your firm.

Most lawyers use Outlook. Outlook does a great job of housing e-mails, contact information and calendars. But Outlook is not relational. You cannot create a case in Outlook and relate people, events, deadlines and communications.

Why would you want case-management software?

In theory, it becomes a central case clearinghouse. It can be a powerful marketing and communications tool. If you group your contacts, you can select specific groups (let's say all lawyers) to receive e-mails or mailers. And with a calendaring plugin like CompuLaw, trial deadlines – down to specific county or district local rules – can be included.

Why wouldn't you want the software?

Sounds pretty cool. Before you set this down and schedule an install, recognize that like anything else, you get out what you put in. You cannot simply pick some software and have it set up that day. Most case-management software is infinitely customizable (frequently more a burden than a blessing). Rolling it out usually has significant implications on how your firm handles workflow.

Ironically, the firms who could most benefit from case-management software are frequently the ones whose implementation efforts fail. The more people in the firm, the more ways different lawyers handle their caseloads, the harder it is to find a set-up that works for everyone. Implementing the software is expensive and time-consuming. You don't want case-management software if your firm is unwilling to take the time to customize it, roll it out, and embrace it. For solos, this can be done quickly. With several lawyers or teams, the project can be involved.

What software is best for us?

That's like asking what car is best for you. Firms' needs differ. The less intrusive and more user-friendly, the better. Software that operates in Outlook (this means the interface lives within Outlook, not that it synchs with Outlook) is best. People are already familiar with the program, so adding extra tabs, rather than a new program, improves the chances people will use it. Other considerations: entries that are readable. Can you use it on the road from a laptop? Does the data synch with your smartphone? How large is the software company, how long have they been around, and will they give you references? Answering these questions will prevent you from selecting the wrong provider.

Two products that meet these rigorous demands are Legal Tracks and Aderant Total Office. They're good, but nothing will be perfect. Unless you plan to commission your own software build (i.e. buy Larry Ellison's next America's Cup boat for him), perfection will be hard to find. (Note: There are several server-based solutions, such as Amicus Attorney, Abacus, and Prolaw. Cloud-based systems are also becoming more popular. These include Clio, Rocketmatter, Mycase, and FirmCentral.)

How do software rollouts fail?

There are two major causes for failure in software rollouts. The first is when leadership spends the money but does not get behind the project. The second is related – staff revolt. Staff does not want to change and continues to do things the old way. Staff revolt stems from a lack of training and floor support. Floor support is where trainers spend a day or two around the office, checking in with users, and help them adjust to the new program.

If you invest the time up front, case-management software can become a tremendous weapon. It will improve your case management abilities. It makes you better at tracking data – including referral sources. And it reduces 2:00 a.m., "when is that due?" ulcerations.

Outro

Back to our caller. As the receptionist put the phone call through, I opened his tab in our case-management software.

He had been opposing counsel on several cases against us. I saw that I had made a note after meeting him at an MCLE. It included the fact that his children both rowed and that he had an interesting case up on appeal last year. I picked up the phone. "It has been a while. You ever get a ruling on that appeal we talked about at the MCLE last year?"

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