

Business Automation Issues

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(revised May 2005)

There are a number of areas in which software can help you automate your business, including:

- ☛ e-mail
- ☛ Practice Management (programs such as Amicus or Time Matters)
- ☛ Document Management (programs such as Worldox)
- ☛ Document Automation (templates, macros, document assembly programs such as HotDocs)
- ☛ Practice Specialty Software (litigation support, real estate closings, estate planning packages, family law packages such as Finplan, etc.)
- ☛ Time & Billing/Accounting packages such as PC Law, TABS, TimeSlips or Time Matters Billing Matters/Plus
- ☛ Remote Access. Whether this is through Internet access to your documents or by synchronizing a handheld device (Palm/PDA: Pocket PC), the ability to do productive work while out of the office, waiting at court, etc. can help reclaim otherwise dead time.
- ☛ Scanning; Imaging Your Paper. Making incoming paper documents available electronically by scanning them can not only save on storage space but reduce the amount of time it takes to locate them.

In an intensely competitive market, the time savings that these programs provide can help you stay even with or ahead of your competition. In many cases, time savings will be great enough to impact your staffing needs.

In evaluating your technology status, you need to examine not only what programs you are using but how well do they integrate with one another. Can you get easily from one to another, or for example see your e-mail from within your practice management software? Appropriate software may also be able to help you “fix” the things that annoy you most about your computer system or do things you wish you could but can’t at present. The following questions will assist you in evaluating your degree of automation and identifying the areas in which you wish to add functionality.

The key element in planning for technology needs is to *first* determine what you want to accomplish and *then* pick the software most appropriate to those needs (also taking into consideration the possibility of adding functionality in the future).

As more and more people are adopting one form or another of Personal Digital Assistants (PDAs), whether Palm (or one of its relatives); Smart Phones that combine Palm and a cell phone; Pocket PCs or Blackberrys, a significant social issue has emerged. While the ability to be accessible at all times and to work while outside the office may at first seem like a great idea, it can also result in changing expectations on the part of clients. Quick responses can lead to the expectation of 24/7 availability. Unless you are

certain you want to buy into this new business of model, you may wish to limit your accessibility in some fashion. Thus for example I have a beeper but almost never give out my cell phone number so that I can choose how best to respond and not have my phone ring when in a meeting with a client.

Many firms are moving toward scanning a significant number of documents. Options vary from just scanning major documents (those received in production, for example), to scanning everything that comes in the door and forwarding it to attorneys only in electronic form. Other firms scan only documents they need to convert to word processing in order to edit. With scanner-enabled copiers becoming more common, it is important to address workflow issues (since a user has to leave their desk to scan a document on the copier). The main issue here is deciding what level of scanning you want, then devoting the proper hardware and personnel to it.

However, there is more to choosing a software package wisely than a checking off feature lists such as the one below. The key aspects of the firm mentality and end-user sophistication are frequently overlooked. When choosing a new software package, ask yourself two questions:

First, are the majority of the firm’s users: a) relatively computer literate; b) relatively computer illiterate but willing to learn; c) technophobes; d) technophobes and proud of it? Divide the responses into groups (e.g., secretaries, paralegals, lawyers). Since the attitude of senior partners toward new software can be decisive in the success or failure of implementing new software, give their status extra weight.

Second, what is the firm’s attitude toward spending money on computers? Place the answer to this somewhere on a scale ranging from “the firm wants to spend as little money as possible to bring it minimally up to speed” (A Penny Saved is a Penny Earned) to “the firm is willing to spend a little more money if that will give it desirable extra features and increase end-user satisfaction” (Don’t Be Penny Wise and Pound Foolish). Interestingly, most firms have a pretty clear idea of where they fall on this spectrum.

Function	Yes (A)	No (B)
Does everyone in your firm have e-mail?		
Can you access your firm e-mail remotely from the Internet?		
Can you fax from your desktop?		
Do you use a practice management program?		
If you have a practice management program does everyone use it?		
Do you have a document management program?		

Do you have a series of templates and/or macros to automate word processing functions?		
If so, does everyone use them or just a few “power users”?		
Does everyone use the same templates, or is it a jungle out there?		
Do you use a document assembly program such as HotDocs or Ghostfill?		
How much of your information (e-mail, documents, time & billing information) can you access remotely or from the Internet?		
Do you input your time on the computer or do you hand-write slips for your secretary to enter?		
If you have a practice management program, does it integrate with your Time & Billing Program?		
with your Document Management Program?		
Do you use an integrated Time/Billing/Accounting program such as PC Law or do you use a separate program for each function?		
Do you have a PalmPilot or similar PDA?		
If so, do you use it just for calendar and phone numbers, or do you do any significant data entry on it?		
Do you want to make yourself available 24/7 to clients?		
Do you want to scan virtually all incoming documents?		
Do you want to scan a pre-defined set of documents (e.g. discovery requests)?		
Do you want to have searchable PDF files or just convert scanned documents to word processing in order to edit them?		
Do you have a scanner for occasional use?		
Do you use an electronic schedule or a paper book?		
Do you use a laptop as your main computer?		
If so, do you use it at home? in court?		
Do you want to be able to work from home on a regular basis and integrate work done at home with your office system?		
Do you use any specialty software:		

Litigation Support (Summation, CaseMap, e-Binder)		
Real Estate closing software		
Estate Planning software		
Family/Divorce (FinPlan)		

Finally, list the 5 things you **dislike** most about your current computer setup:

List the 5 things you would like to do but cannot at present. Would a “yes” answer to any of the above let you do these things?
