

Briefing

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Tomorrow's world



Interview

Jan Durant, Lewis Silkin

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Feature

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INDUSTRY ANALYSIS FIRM-WIDE INTEGRATED IT

Unity and purpose

Tony Klejnow, MD of Linetime, outlines what has to change in practice management IT to make law firms more competitive

Significant changes lie ahead for law firms, if they want to stay competitive. The technological transformation required is to move away from passive back-office behaviours to active business management – and it's only through firm-wide integrated systems that this will be possible.

Active business management means monitoring and forecasting financials, turning manual processes into automated ones, really using customer relationship management systems (rather than just toying with them) and engaging in better client interaction, and using integrated, firm-wide IT systems to enforce compliance and reduce risk.

Though the 'best of breed vs single system' debate will no doubt run on, there's no doubt in my mind that a single system is the best way to deliver on those new PMS goals and create efficiency – there's no re-keying or synchronisation, you get simplified systems support, and there's no need to manage interfaces between disparate systems.

Never has the need to monitor work streams been so great, but you can only do this if you can 'see into' every

part of the business. This can be readily achieved through business intelligence (BI) tools within a good, firm-wide PMS, delivering 'live' information.

BI can deliver the metrics the firm's management needs and it can completely transform how agile a firm can be.

I think BI is also essential to implementing a key performance indicator-based performance measurement system in law firms (see our [case study on Wilkin Chapman Grange for more on that](#)). BI can also be used to monitor risk and compliance, so it can be of use far beyond finance.

Moving to global workflows

A well-designed PMS must provide the tools and systems to monitor and guide users through the compliance process, forcing them to adhere to the firm's (and the regulator's) standards – this is a lot easier with a firm-wide system.

This compliance workflow is an example of techniques previously used only in case management. But 'global' workflows create standardisation across the whole firm, which in turn creates efficiency, because processes are much easier to control

from a risk and compliance perspective than people. Workflow engines can also drive functions such as file inception and closure processes (read [our case study on workflow at DWF to see how this works](#)).

Getting closer to clients

Client expectations are changing, and firms need to change their service delivery models to meet these expectations.

A PMS needs to not only service the practice – it can and should present clients with an external view of providing additional information, when they want it. An effective way to do this is to provide a client service portal, allowing clients access to their own case information. This portal should also, ideally, support communication and collaboration between firm and client.

These techniques are already used by firms supporting referrers and commercial clients, and they can slash the number of day-to-day queries received – and, therefore, the time lawyers spend feeding information back to clients (read our [case study on how](#)

[Hay & Kilner is delivering matter transparency](#), below, to see that in action).

This kind of client-focused thinking is the future of PMSs, and it will, I think, become a basic, tick-box element.

It's also representative of the PMS's transition from a passive back office system into an active business management tool, a CRM repository, a client service portal, a compliance and risk monitor – and, of course, a finance and time-recording system.

Case studies

- DWF using workflow to cut costs, drive value

<http://bit.ly/LinetimeDWF>

- Hay & Kilner delivering matter transparency and lower costs with an extranet

<http://bit.ly/LinetimeHK>

- Wilkin Chapman Grange using BI to manage KPIs

<http://bit.ly/LinetimeWCG>

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