Foreclosing on Efficiency

Staying profitable and efficient while integrating new management software.

By Carol Cummings

Name:
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Practice:
Rogers Townsend & Thomas represents the interests of small businesses and corporate and institutional clients throughout the country. The 36-attorney firm focuses on four practice areas, including real estate, default services, labor and employment litigation, and title services.

Problem:
Finding a case management system robust enough to meet the firm's technical and business requirements, and flexible enough to integrate with its existing technology.

Rogers Townsend & Thomas is a rapidly growing law firm with offices in Columbia and Myrtle Beach, S.C. Our firm is noted for a diverse range of law specializations, the most notable being mortgage foreclosure. For more than 15 years, we consistently have ranked among the highest in volume of all South Carolina firms, having successfully prosecuted more than 25,000 cases since 1986.

In the past few years, we have been challenged by changes in the foreclosure industry. Timelines have shortened dramatically, requiring our firm to maximize efficiency in every way possible. Clients who once expected foreclosure in 180 days or more now demand completion within 120 days or less. With 60 days less to foreclose, we have been forced to achieve more than 30 percent increased productivity to stay competitive. We found that effective use of technology is the most important strategy to meet these deadlines, keep our clients satisfied and maintain a competitive advantage.

Client expectations are only part of what drives us to use technology for maintaining efficiency. A significant financial incentive also motivates us to close cases with fewer dedicated attorney hours. Our foreclosure department charges a flat fee for each foreclosure. In other words, every hour the attorney or staff member saves increases the firm's profit margin, and every extra hour spent decreases the firm's profitability. Because the firm doesn't get paid until the case is complete, maintaining efficiency and meeting deadlines is crucial. The faster a case is closed, the sooner the team can move on to the next one.

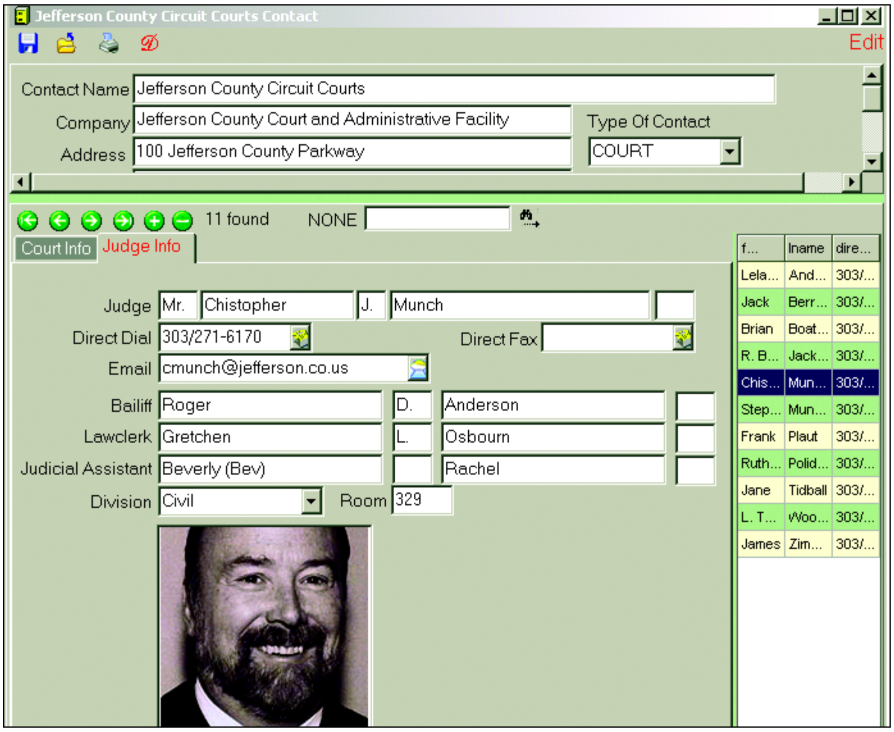
Given these conditions, our efficient use of technology to provide organization and documentation has a direct effect on the success of Rogers Townsend's foreclosure practice, both professionally and financially. These factors were important to consider when selecting the right technology packages for the firm.

Finding the Right Solution

In building our technology architecture, we realized we needed to automate foreclosure processes as much as possible, creating an "assembly line" structure. Since our foreclosure department opens hundreds of files each month, standardized workflow was essential. The new process had to reduce redundant efforts to streamline the whole procedure. Ideally, department staff should enter information only once, making that data accessible to everyone at any time.

We began looking for case management software that would serve as a main data resource while integrating with our existing and future technology choices. Initially, we developed a custom homegrown solution using an internal programmer. This system was adequate early in our firm's history, but as our firm expanded, we realized Rogers Townsend needed to find an established and robust case management system. The product also had to be customizable to individual requirements and integrate with our other applications.

We evaluated several case management products, including those by Mitratech and Computer Law Systems, but decided on Synaptec Software's LawBase. LawBase had the adaptability we wanted, and its technical team worked with us to create the integrated interfaces needed for our other products. Synaptec's development team also ensured us that LawBase would integrate with our Novell GroupWise e-mail system, LexisNexis HotDocs and Interwoven WorkSite applications.



LawBase integrates with Novell GroupWise, LexisNexis HotDocs and Interwoven WorkSite.

A Work in Progress

We encountered several challenges while implementing LawBase, requiring significant attention from our internal IT department and Synaptec's technical team. First, we had to convert all our data from a dBase database into LawBase, which was easy but time-consuming. Second, we had to create all Corel WordPerfect merge templates and forms used to retrieve the data from LawBase, a tricky process but well worth doing.

Since the initial installation, we also have upgraded LawBase from a proprietary database to a SQL database. Through extensive testing, we were able to achieve this upgrade with minimal difficulty. Last, all documents had to be rewritten into HotDocs templates, a labor-intensive but necessary process. In spite of all this, we found LawBase to be problem-free for the most part, as long as we were thorough in our planning and execution.

LawBase has evolved with us as our firm has grown. The technical team's help with integration was invaluable. Most recently, Synaptec's team built interfaces with LenStar, our mortgage default management software, as well as ProVantage, our new time and billing software. Also, for courtroom appearances, our attorneys now can bring a laptop to the courthouse to have instant access to case files, scanned documents and the firm's network using LawBase via a wireless Citrix connection.

One especially useful feature LawBase offers is SmartFolders. This feature has revolutionized our foreclosure process and has had the greatest positive impact on our business by providing a unique method of tracking files and matters. We can manage the entire foreclosure process centrally — from the initial creation of a file and matter, to closing the case. It allows our staff to enter data and check its status, and track relevant documents and e-mails while staying abreast of working timelines. Since LawBase is tied into our other applications, our team can use the product as the main application for running the daily business.

Selecting the Right Solution

Being comfortable with the vendor's team is absolutely key to a successful product implementation. It's imperative that you evaluate the technical team your firm will be working with, as well as the software's features, functionality and flexibility. Key questions to ask the vendor include: Is the team experienced and easily accessible? Does the company have a successful track record with firms of your size and practice area? Does the company have adequate resources for integration, development and testing?

It's important to talk with the technical support and installation team, not just the sales people. They are the ones who must make the software operate, and they will be your primary contacts after the sale is completed. Our working relationship with Synaptec's technical team led to the ongoing success of our LawBase installation.

Finally, select a product with the right mix of standard features and customizability to suit your firm's unique needs, including the all-important integration factor. Integration issues are of critical importance, so make sure these are addressed in any service proposal you receive. Most case management vendors should have product integration capabilities listed on their Web sites, but be sure to verify version numbers and currency of the integration. If your products are not listed, be sure to ask about them before signing on the dotted line. loc

Carol Cummings has been with Rogers Townsend & Thomas for 14 years. She is a certified public accountant and has been in executive management for 30 years.