

How to Select and Successfully Implement a Matter Management Solution for Your Office

This is Part I of a two-part article on Selecting and Implementing a Matter Management System at a law office. This first installment will focus on your internal review of why you need a matter management application and selecting the right vendor. Next month in Part II, we will talk about how to plan for and implement the matter management solution at your firm.

Part I - Selecting a Matter Management System

Overview

When I was a practicing attorney, I supervised the implementation of a matter management system at my firm. Now that I am on the technology side, I believe that my roots in the legal profession give me a unique perspective on the process of successfully implementing a matter management system at a law firm. Once our system was installed at my firm, we wondered how we were ever able to practice law without one.

Today technology drives information to us faster and faster and unless we have an efficient way to handle all that information, it can easily overwhelm us. A good matter management system can help you to organize this information so that you can quickly retrieve it. This can not only make the highly paid professionals more efficient but it can also have the added benefit of improving your relationship with your clients. You will be able to answer client questions more quickly and confidently. You can also decide to share selected matter information with your clients

While improving the efficiency within your office should be your primary reason for selecting a matter management system, you should also be aware that many firms point to technology as a competitive advantage allowing you to differentiate your firm from another down the street.

Setting Reasonable Goals for the Matter Management Project

The first step in looking for a matter management solution is to determine what your goals are for the project. What are the “pain points” within your office and how can a matter management solution help you to solve those issues? It is advisable to do this prior to reviewing vendor information. Survey your own users to determine their needs and requests. Also, consider your available budget for the new product, including software purchase, required hardware, implementation and training. These factors will combine to determine the scope of the project.

No software application will solve all of your problems the first day that it is installed. Therefore, tiered goals are best. Set reasonable goals for the very beginning of the project and then set additional objectives for subsequent benchmarks along the way, creating different phases for the installation of the software. If your office is large, you

may determine that you want to bring on different practice areas in a staggered fashion. You can get a core group up and running efficiently prior to bringing the next segment online.

Matter Management Vendor Criteria

Understands Your Needs and is Qualified: The vendor should listen well and grasp a firm understanding of your needs and be able to demonstrate experience similar to what you will require.

Longevity and Track Record: Select a vendor that has a strong history and proven track record of staying abreast of technology advances.

Size of Company: Remember that size of the vendor company does not necessarily equal stability. More important is that the vendor that has a proven ability to install matter management solutions successfully.

References: Ask the vendor to provide you with references so you can speak with existing sites that are similar to yours. Ideally, you will want references in your same practice areas, geographic area and approximate size. You may find it useful to speak to both new installations as well as long-time clients. The advantage of newer clients is that they can give you an idea of why they chose the selected vendor over competitors that you may also be reviewing. Long-time clients can tell you how the vendor will handle support and upgrades, which should be critical considerations as part of your selection process.

Matter Management Product Criteria

In evaluating the matter management application itself, your needs will be somewhat unique, but your solution should include the following core features at a minimum:

Flexible Database: The heart of any matter management is the database that tracks selected information. This database should be flexible enough to be adapted to meet your requirements. Many leading matter management systems today will allow you this flexibility, so then determine how easy it is to make these adaptations.

Rolodex: Your matter management system should effectively replace your current rolodex, or contacts contained in programs such as Outlook or Groupwise. A centralized address list allows all users to access contact information rather than having each user maintain their own list of contacts.

Calendar: All leading matter management programs will have a calendar function, but you should also make sure that it works with your current Outlook or Groupwise calendar.

Case Diary: It should have an easy way to track activity on a matter. This “electronic legal pad” allows you to track free-form text that doesn’t easily fit into the structure of a database.

Document Creation and Reports: Once you have entered information into your matter management system, you want to make sure that you can leverage that investment by using the information to produce documents and reports. An ad hoc report writer that makes it easy for a non-technical user to query the database should be a requirement.

Multiple Connection Options: Make sure that the application will operate on your networking infrastructure. Consider all the ways that users will need or want to connect to the system from outside the office. The answers to these questions will determine if you need to look for an application that is client/server-based, Wide Area Network-based, Web-based, works in a Wireless environment or a combination of the above.

Expected Benefits

How can you expect to benefit after investing in a new matter management system? What will be your Return on Investment (ROI)? Partially, evaluating your success will depend upon your goals going into the project. At the very least, you should be able to expect the following benefits for your office:

- ✍ Increased Efficiency – A matter management system should allow your staff members to handle exponentially more matters than they could with a manual system. One site remarked that they increased the number of matters handled by 800% while increasing staff by only 100%. Another client stated, “In a period when all other agencies were requesting additional staff to handle an increasing workload, we maintained our staff level. In fact, our caseload has increased significantly over the last 3 years, yet we have been able to handle the increase without hiring additional staff.”
- ✍ Provide better service – A matter management system allows you to provide improved service to your clients.
- ✍ Create a knowledge base – A matter management system allows you to search past matters easily. In this way, you can quickly search past actions so that you do not constantly have to “reinvent the wheel”.

Integration Considerations:

Matter management applications tend to fall into two categories - either the “best-of-breed” or “all-in-one” solution. The type of product that you select will determine whether integrations to 3rd party applications are necessary. If you selected the “all-in-one” solution you probably did this partly to avoid integration issues so your integration considerations may be less of an issue. However, be sure to examine the actual points of

integration that the system delivers, as well as realizing that best-of-breed products will frequently have more matter management functionality than the all-in-one offerings.

The abovementioned recommendations are aimed to assist you in selecting the matter management solution that ideally fits the needs of your firm. Since no two firms are exactly alike, your firm must evaluate its options, carefully prioritizing according to what you really need.

This concludes Part I – Selecting a Matter Management System. Next month, Part II will address the implementation of the solution you have chosen. From pre-installation planning and timeline setting to project rollout and training, the matter management product requires the right preparation and execution.