

Back to Basics

With acronyms such as PMS, CRM, KM and HRMS, the systems used by law firms can resemble a bad hand at scrabble. Large law firms will have a full suite of software helping the support functions, and the very largest add in extras such as workflow and business intelligence systems, and may even elevate practice management to the level of Enterprise Resource Planning or ERP.

No one in these times would advise running a law firm with no IT at all (although surveys have shown that there are still one or two out there), but what are the basics that are required for a smaller firm?

Documents and Email

The most vital IT systems are somewhere to store documents and some form of email. There are two key features needed for the former; file storage should be secure and it should be organised. This does not mean that a full document management system is required. Several large London and regional firms manage quite happily without a commercial DMS. To do this, a firmwide set of rules for how to file needs to exist, and it is best if this is helped by macros in Word and other Office applications to make it simple to find the correct location.

Microsoft Exchange now dominates the email sector, mainly because it is an extremely good product. Cheaper systems could be used, but care needs to be taken as delegating access and sharing calendars are important features to law firms, and these are often the first to be missed off. With the advent of Exchange 20003, use of externally hosted email is practical and may well prove cost effective once support costs are taken into account.

The other core system is obviously the practice management system. This has only reached third on the list because the very smallest firms can and probably do survive with judicious use of Excel spreadsheets and an accountant. Larger firms will not only need a good accounting system, but also the extras required by a law firm such as time recording and billing. It is possible to stop at the stage where the PMS is simply part of the accounts department, but most firms will be purchasing an all-in-one package such as Axxia. These add elements of functionality required on the fee earner's desktop, including basic functionality for areas such as document management and client relationship management.

Contact Management

Once area that most firms do not invest as much in, but is just as important is contact management. All firms should work with a central list of the people and organisations they know, and not be keeping this valuable data in isolated silos stored in people's personal mailboxes. Note that this central list should be more than a list of clients with the key contact, which will always be stored in the PMS, but should contain everyone who is known to anyone

in the firm. In this way, these relationships can be exploited to help gain clients, and mistakes that can lose clients can be avoided. With the other basic systems in place, it is quite likely that a central contact list can be achieved without additional software, using either the practice management system or shared areas of the email system. To get full value out of centralised contact lists, which will help gain acceptance for sharing the information, it should be integrated with Word to easily allow correct details to be inserted into letters and other correspondence.

Internet and Intranet

The final things to mention in this quick run through of the basics required by a law firm are a web site and an intranet. Both of these should exist, and are probably out of place at the end, as they fall into the must have category. Firms without a web site are probably not going to have much of a future, if only for the fact that the message this sends to potential clients is of a backward and out of date organisation. Ideally, the web site will present a fresh and up to date view of the firm and be revised regularly. Provision of information about the partners and some free advice documents helps start a good positive client relationship before they pick up the phone or walk in the door.

So why is an intranet a must have? Every organisation has information that needs to be available to all members of staff, from the procedure to booking a holiday to latest client gains. An intranet provides a simple means to achieve this; in essence it can be a flexible and interesting notice board. For a small firm, this does not require expensive software systems. At the end of the day, an intranet can be a set of html documents in a shared folder which can easily be maintained in FrontPage or a similar application. Larger firms may need more structure, but basic intranet packages are not expensive.

Summary

All law firms have the same basic business requirements. How these are supported by software will vary considerably with the size and type of firm. When deciding where to spend the money, two things should be remembered:

- All key business areas should be supported by the IT systems, but this does not mean that all areas require dedicated (and expensive) software systems.
- To get the best value, all systems should be integrated with each other and more importantly to Word and Office.

With these taken into account, firms of any size should be able to get good value IT helping their business.

Adam Westbrooke is the managing director of Firstcourt, a strategic IT solutions company specialising in helping professional services firms. For more information call Adam on 0870 350 3660 or see <http://www.firstcourt.co.uk>.