

Essential IT

No one in this day and age will argue that a law firm can get away with no computers at all; even the least technical sole practitioner will use a PC for some elements of their work. But assuming your firm has at least a few people in it, what is the starting point for IT investment in the modern world? In answering this question, we will make no assumptions about what firms already have. While most of the items will seem obvious to most people, there will be many firms missing one or more of them. In defining essential IT investment, the key consideration is the benefit gained compared to the cost. As this latter element is always decreasing, some items will appear on the essential list that firms may previously have had down as prohibitively expensive. For this reason, it is important that IT strategy is reviewed regularly.

The basics

Step one is a network of PCs. A rule of thumb that was often quoted in the early days of networking was that the usefulness of a group of PCs was proportional to the square of the number of them that were networked. In other words, ten PCs are ten times more useful when joined together. This is even more true today where connectivity is assumed. Added to this network should be a separate server, which will help manage the flow and storage of information. These days, the price of servers has fallen to a level that is affordable by even the smallest two person firm, and the benefits are considerable.

To add a bit of detail, PCs and laptops should be running Windows 2000 or XP. Earlier versions will be costing time and money in additional support costs as well as increasing the security risks to the firm, and other operating systems will not support the basic applications and tools common to lawyers. Servers should be running Windows 2000 or 2003 Server (Small Business Edition for very small firms). Again, non Microsoft options are possible, but in a small community such as the legal world, going against the herd will cause problems.

Of course, virtually every law firm runs Microsoft Office, and a copy of Word (2000 or above) on every desk is a must. With Microsoft pricing, it is hard to argue against a full copy of Office (but hard to argue *for* the Professional version that includes Access)

Communications

The work of a solicitor is as much about communicating as it is about documents, and as such there are several elements that should be in place.

First, email, and that means Microsoft (again) Exchange and Outlook. Lotus Notes and Novell GroupWise may once have had some merit, but since Exchange 2003 firms can consider themselves at a disadvantage if running something else (even an older version of Exchange).

Email should be available to all members of the firm with their own email address, and shared email of the office@lawfirm.co.uk should be restricted to web site enquiries. Customer service is important, and people do not like to have their lawyers hiding behind communication walls.

Email has now progressed beyond the basics, and there a couple of add on features that are also now in the essential list. The first is the BlackBerry: once regarded as a flashy toy for big firms, but now a cost effective add on for all partners and senior associates. As a recommendation, go for the newer hybrid phone/email BlackBerries and do not carry two devices around.

The second extension to email has two halves, both related to the demise of the fax machine. First, firms should be able to easily scan documents and email them out instead of faxing them. The increased resolution and the ability to do this in colour justify this in themselves, but the client will also appreciate the ease of handling an email attachment. For the reverse, incoming faxes should be converted to emails with attachments. Again, simplification of communications is the aim, with a resulting increase in the speed of response.

Finally in the communications area we have the telephone system. And yes, that is part of the IT strategy. A phone on every desk is probably obvious, but less common may be the use of direct dial numbers (again an essential part of appearing to be a modern firm, and an expectation from clients) and the use of voicemail (ditto). Firms who only issue a switchboard number to clients and take manual messages, or worse no messages at all, are likely to find this interpreted as a symptom of a firm that is not up to date, and by extension unlikely to be up to date with the law.

The practice systems

All firms will need some form of accounts and practice management system, but there are a few features that firms should make sure are included, or add on if they are not. On line time recording is now an essential, delivery benefits in terms of accuracy and efficiency in billing. This should be couple with on screen delivery of key performance and management information to fee earners. The frequency of this may vary from real time to monthly, but at firms should be targeting at least a weekly delivery of meaningful information about how people are doing against targets.

When it comes to managing the matter workload, a good matter management system is now an essential. While traditional case management systems can be adapted with generic matter workflows, more modern practice management systems provide a more flexible way of defining common processes. Workflows should be in place to help with client inception and monthly client management as a minimum, and most firms will take this a lot further once they have started.

A document management system is also required, but for small and even mid size firms the facilities for document storage built in to a case or matter management system may be enough, so this is one area where the essential requirements are different for larger firms.

Of the other big systems often installed by large firms, CRM, or Customer Relationship Management, is not an essential item as a piece of software, but should be managed with some strong procedures about what is recorded where and when. Knowledge Management is again more about procedures than about expensive software, and for most firms the facilities available in their case/matter management system will be more than sufficient. For both of these systems, a modern generic workflow module will provide the background system that allows these stricter procedures to be supported effectively.

Summary

Some of the essential listed above may surprise people, and some will disagree with what we have chosen. However, firms should consider carefully when rejecting any of these items whether their objections are valid, or if they come more from a fear of change and of technology. The list is actually quite short, and the most controversial elements are likely to be those that are changes to working practices and in particular the theme of making lawyers more accessible and accountable to their clients.

As a final note, while all the facilities above have been described as existing in-house, many of them can now be bought in as services, and there is nothing wrong with taking this approach if it suits your firm.

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