

CASE STUDIES:

LAW FIRMS' TECHNOLOGY SUCCESS STORIES

Legal administrators and law firm managers must constantly stay informed about developments in technology to keep their offices up to date and efficient. The articles in this special section are case studies that showcase success stories about installation and implementation of technological tools in law firms large and small.



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With a solid commitment to technology and knowledge management, law firms of all sizes can provide their legal services faster and with greater levels of confidence.

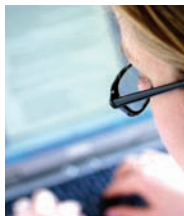
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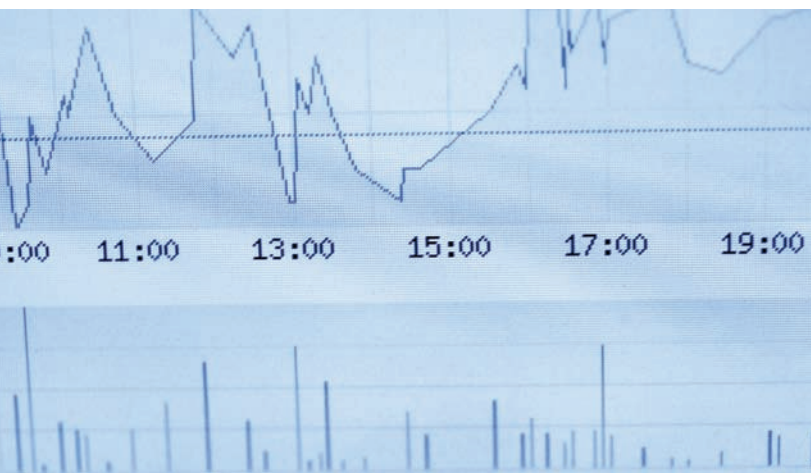
One law firm finds immediate success – and a considerable return on its investment – in purchasing Client Relations Management software to make attorneys and staff more efficient.

BY VICKI SCRUGGS

An Indispensable Tool

One law firm finds immediate success – and a considerable return on its investment – in purchasing Client Relations Management software to make attorneys and staff more efficient.

BY VICKI SCRUGGS



Like most legal managers, when I recommend new technology to my firm, my recommendation is the result of careful research and studied prioritizing. Any software we purchase must be user-friendly, integrate well with our existing technology, and most importantly, it must be cost-justifiable.

My firm is Bone McAllester Norton PLLC, which has 30 attorneys and is headquartered in Nashville, Tennessee. Like yours, our firm keeps a close eye on expenses, and we take every opportunity to streamline our workflow as much as possible, maximize our resources, and stretch our current staff to meet the needs of a growing client base.

In the summer of 2006, we set out to identify a Client Relationship Management (CRM) software product that would meet our requirements. We had been considering the addition of CRM software for quite some time. The reason we decided to move forward was the need to improve our contact database in advance of a major event we were planning in honor of our firm's fifth anniversary and three attorneys' 60th birthdays. As we began preparing for the event, we realized that our firm-wide contact database was in even worse shape than we thought. We knew that the firm's invitation list should and could be better managed, and that we needed software installed and running in time for the party invitations to be mailed. If the anniversary/birthday party was not enough to motivate us to find a solution, the fact that the holiday gift and card mailings were right on its heels was added incentive. These holiday projects had been an enormous challenge for the previous three years, and I was determined to find a better way.

ALA members know that holiday projects such as mailings and parties are typically approached with a sense of dread, even by the most intrepid veterans, because they add to an already challenging year-end workload. In the past, much of my time leading up to the holidays was spent "hounding" the attorneys to review and submit their holiday gift and card lists by day and handling the rest of my job by night. Also, in past years, we paid our employees overtime, hired temps to help with the mailings, and spent days cleaning up lists, only to see an inordinate number of cards returned due to incorrect contact names and bad addresses. All of the wasted effort, cards, envelopes, and postage were embarrassing and unnecessary expenses.

TIME FOR A CHANGE

As the firm's executive director, I believed strongly that there was no better time for us to buy and install a CRM software package. During the past five years, we had successfully installed other productivity software, such as WORLDOX for document management and Juris for accounting, time, and billing, so there was clearly precedent at our firm for investing in the best technology available to mid-sized law firms. Nevertheless, I needed to present a strong case for buying a CRM system that would convince our firm's managing partner and board of directors of the need for it.

We found several excellent CRM products in the legal marketplace, and we previewed each product we identified. We also previewed several multipurpose products that we hoped would include contact database management. We ultimately selected Cole Valley Software's ContactEase CRM product (www.colevalley.com), which we believed was the best product for our firm because of its functionality and ease of use. Furthermore, each Cole Valley representative we met seemed to have a genuine interest in our firm, and we felt they would be conscientious and responsive to our upcoming immediate need.

OBTAINING BUY-IN

Before we could purchase ContactEase, though, we needed "buy-in" from our firm's managing partner and board of directors. To do this, it was essential to demonstrate the return on investment (ROI) that we expected to receive from CRM generally and ContactEase specifically. We compiled numbers to compare the cost of recent business development efforts with and without CRM software. Cole Valley President Jeff Reade helped to develop our comparison matrix. Due in part to this preparation, we persuaded our managing partner and board of directors to approve the software purchase.

For our cost-justification study, we maintained that we could achieve savings in three primary areas: (1) attorney billable hours in reviewing invitation lists, gift lists, and mailing lists; (2) employee overtime and temporary staffing cost; and (3) printing and postage cost for duplicate and erroneous mailings.

To calculate the savings in attorney billable hours spent reviewing invitation lists, gift lists, and mailing lists, we started by creating a matrix with the following assumptions: (1) number of attorneys; (2) average billing rate of the attorneys; (3) number of regular event mailings per year; and (4) holiday mailings. For each regular event mailing, we included an estimate of average attorney review time and multiplied it by the number of events, for total annual review time by each attorney.

We then multiplied the total annual review time by the average hourly billing rate for attorneys, and we estimated the cost to the firm in billable hours spent by each attorney on mailing list review – without ContactEase in 2005 – and multiplied that by the number of attorneys. We followed the same methodology for holiday mailings, except to provide a greater length of time for average attorney review

Vicki Scruggs, Executive Director, BONE MCALLESTER NORTON PLLC, Nashville, Tennessee



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in gift selection. Proving that the CRM system would have a significant ROI for our firm was instrumental in gaining the approval to purchase the product in 2006.

THE RESULTS

Using ContactEase for our major event invitation mailing in 2006, we were able to streamline attorney review time. We created a review spreadsheet for each attorney by "dumping" their contacts from Microsoft Outlook, with an "Invite" column to easily mark online. After each attorney had marked his or her contacts, we were able to combine the invitees, sort them, and readily clear the duplicate invitees.

For the holiday gifts and cards, we created a similar attorney review spreadsheet, but the column headings included Invited, Gift A, Gift B, Gift C, and Card. We believed if the attorneys could easily see which contacts they had recently invited to the anniversary/birthday party, it would hasten their decision-making process for gifts and cards. This proved to be a good idea, and almost every attorney commented that the process was quicker and much less painful than anything we had done before.

Our 2006 holiday gift and card mailing process was substantially more efficient and cost effective with the CRM software in place. We saved time and money in several areas as compared to 2005. First, we saved on attorneys' time spent going through contacts to select gift and card recipients. For a 30-attorney firm, we saw an average savings of approximately two hours per lawyer at an average billing rate of \$285 per hour. That's \$17,100 in billable hours that the lawyers could use for billable time rather than for an internal project. We also imposed less stress on our service center staff and legal assistants who were helping with the process.

Also, since ContactEase helped us to accomplish the mailings faster and more efficiently, we saved

on employee overtime and the cost of temporary employees. Finally, we saved the cost of printing unnecessary duplicate cards and envelopes and wasted postage for invitations that never reached valid recipients.

THE BOTTOM LINE

The most important benefit, of course, is that the firm achieved its goal in undertaking these projects in the first place – expressing our appreciation to our clients for their business and their trust in our firm, and cultivating new relationships with potential clients.

Deciding to implement CRM at Bone McAllester Norton has been an important decision for our firm, from operational and marketing standpoints. We only recently synchronized each attorney's Outlook contacts with ContactEase, but we have utilized the software "back office" for two events and two mailings. For this year's holiday mailings, we intend to document the ROI more exactly as a way of benchmarking ContactEase's ongoing impact on the firm.

If your firm is considering the purchase of CRM software, first think about what you want from the product, including cost savings, and then take actions to help you achieve those objectives. Choosing the right software vendor, documenting the ROI numbers, and hiring qualified personnel will help substantially throughout the process. ✱

about the author

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