

Law Office Management: *Managing Your Professional Staff, Matters and Knowledge*

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Matter & Information Management

University General Counsel

Lower Your CHAOS Quotient



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Agenda

- Introductions
- Information Management in the GC Office
- Matter Management Systems
- Advantages & Disadvantages
- Your Current Environment
- Choosing the Right System
- Successful Implementation Tips

These Materials Will Be Online

Legal Technology Institute:

- www.law.ufl.edu/lti



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- University of Florida Levin College of Law (1997)
 - Director, Legal Technology Institute
 - Associate Director, Technology Services
 - Executive Director, ICAIR
 - Adjunct Professor, “Law Practice Management”
- Legal Technology Consultant (1989)
 - 300+ Law Firms, Law Departments, Judiciary, Law Schools, Legal Verticals
- Speaker
 - ABA TECHSHOW Chair (2000, 2001)
 - LegalTech Conferences Co-Chair (2000-2005)
 - 200+ Presentations
- Author
 - *You Can't Get Much Closer Than This*
 - *Computerized Case Management Systems*
 - *The Internet for the Legal Profession Seminar*
 - *WordPerfect Solutions for the Law Office*
 - 100+ Published Legal Technology Articles

Defining Matter Management

- What Matter Management is
- What Matter Management is not
- MS Outlook? Legal matter manager?

- Confusion in the market?
 - “Case” Management
 - “Matter” Management
 - “Practice” Management
 - “Litigation” Management
 - “Contact” Management

Information Management

- Matter Information
- Generating Documents
- Storing & Retrieving Documents
- Calendars/Ticklers
- Email (and Attachments)
- Remote Access to Information
- Portable Computer (Synchronization)
- PDA (Personal Digital Assistants)
- “Knowledge Management”

The word "CHAOS" is written in a bold, red, sans-serif font. It is centered within a dark blue oval that has a thin white border. The oval is positioned to the right of the main list of items.

CHAOS

Matter Management Systems

- Basic Functions of MMS:

- Client Rolodex →
- Matter Database →
- Document Generation →
- Matter Diary →
- Calendar/Schedule →
- Matter Reports →



All MMSs Have These Functions!

You're Already Doing It

- You Use a Rolodex
- You Have a File for Every Matter
- You Keep a Calendar
- You Keep a Diary
- You Use a Word Processor
- You Prepare Reports

“Document Centric” Environment

Macros & Templates



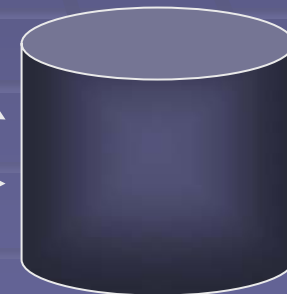
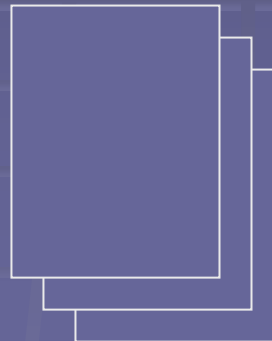
Standard Document



MS Outlook
E-mail
(Attachments)

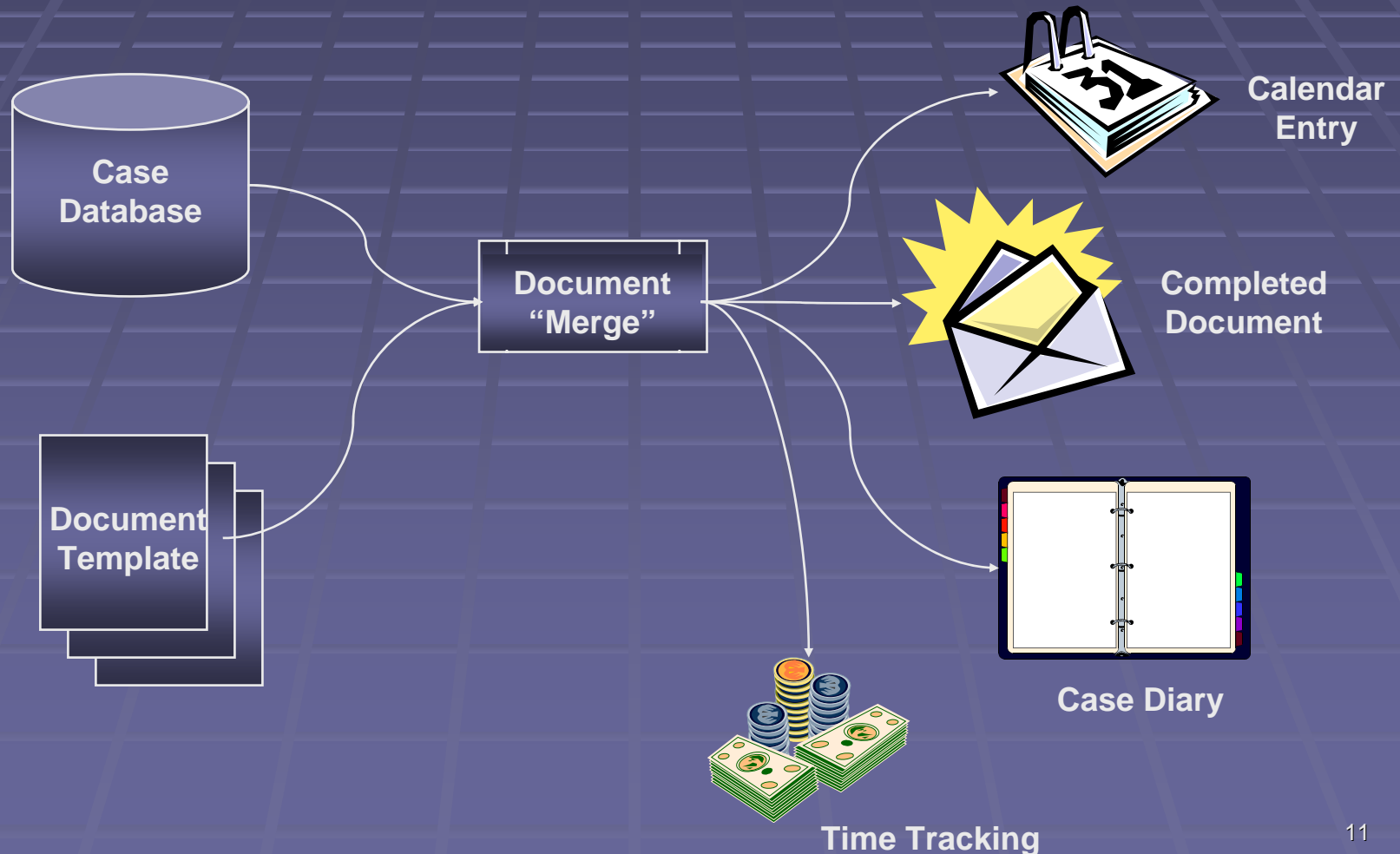
Save
and
Retrieve

HotDocs
Document
Assembly



Document
Management
System

“Matter Centric” Environment



Considerations

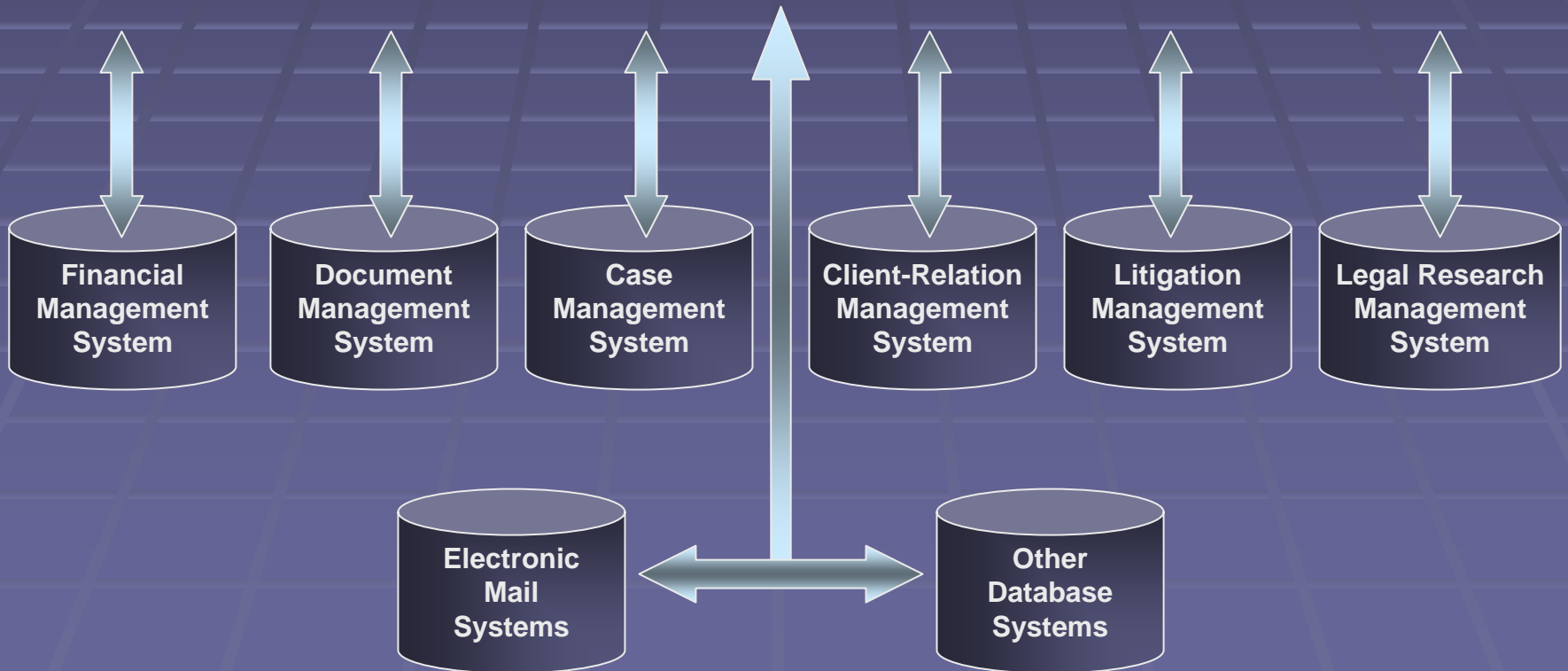
- Current Technology Environment – with what system will your MMS integrate?
- Data Migration and Conversion Planning – where will your data come from?
- Current Processes and Workflow – automating an inefficient procedure set makes no sense
- Available Internal Resources – how much lawyer and staff time will be required?

Matter Management Systems

- AbacusLaw
- Amicus Attorney
- Case & Point
- CaseTrack
- Law Base
- LawTrack
- Legal Files
- Legal Edge
- Perfect Practice
- PerfectLaw
- ProLaw
- Practice Manager
- RainMaker
- PCLaw
- PracticeMaster
- Time Matters

Touching on “KM”

Knowledge Management System



KM Concepts

- Knowledge management is NOT solely the management of computers and software.
- Technology alone cannot achieve the strategic goals of knowledge management.
- Knowledge Management cannot rely solely upon people either.

THANK YOU!

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