

TECHNOLOGY A Special Report

Portal to an Efficient Day

Lawyers are opting for customized technology to manage the work flow.



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Information technology is a double-edged sword for attorneys. While the Internet, databases, and many desktop productivity tools like word processing have enhanced an attorney's practice, much has proven overly burdensome.

E-mail and calendar programs have shifted the burden of many administrative tasks such as correspondence and scheduling to attorneys when they were once handled by legal secretaries. And while attorneys now have tremendous amounts of information available to them, they must become proficient in a myriad of programs to gather everything they need to apply their legal expertise to a matter. This is often a time-consuming and frustrating process for people trained in law and not computer science.

Information can be presented to attorneys in more manageable and meaningful ways, letting them focus on applying their legal skills, not becoming technology experts. Attorneys face significant hurdles when it comes to accessing the information necessary for them to work efficiently and effectively: too many programs to learn and no time to learn them in any great depth; client and matter information spread across many databases, disk drives, and applications; and prohibitive software licensing costs.

A portal—a Web page that pulls data and information from many sources and customizes it for the attorney—can overcome these hurdles. Portals have been successful in many corporate and government environments for years, and are only now making inroads into law firms. A portal does not replace large systems such as e-mail, accounting, document management, docketing, or litigation support. Rather, it consolidates data and presents it according to the way an attorney or staff member works.

Its common platform is the ubiquitous Web browser, such as Internet Explorer. Think of a portal like a Web page:

instead of news or sports from CNN, it displays client-matter information such as documents, messages, billings, calendars, and contacts gathered from applications and databases. Portals may also provide extra features such as e-mail alerts, becoming a very powerful tool for the attorney desktop.

Portals provide attorneys greater, easier, and smarter access to information. Below we will follow an intellectual property attorney through a typical day using a portal, showing how it improves communication, productivity, and awareness.

Because attorneys no longer have to learn a myriad of applications, portals allow them to better apply their legal skills and to provide better client service. Portals expand availability of information to more people throughout the firm who use it for work, management, quality control, or supervision.

7:03 a.m.: Over a cup of coffee before the morning commute, our attorney logs into the firm's secure portal from her laptop through her wireless home network. The portal provides personalized information on her docket, calendar, billing information, industry news feeds, and even e-mail. This keeps her informed and helps her prioritize her workload for the day. The firm's docketing application feeds her own daily docket to the portal. Upon review, she notices a number of new patent application deadlines that need to be extended. Via the portal, she sends a few e-mails to the docketing staff, specialists who update and maintain the docketing application. These e-mails will be waiting for them when they enter the office around 8 a.m.

8:25 a.m.: Our attorney gets into the office. She opens the portal through her Web browser, logs in, and pulls up her docket. On the drive into work, she had decided to work on a response to a Patent and Trademark Office (PTO) action first.

Instead of calling the records department and waiting for the paper file to be delivered, she displays the virtual file on the portal. The virtual file is simply a compiled list of all the documents for that matter in the document management system (DMS), organized by client correspondence, PTO correspondence, and artwork, just like a standard IP paper file.

Since the documents are all electronic, they are much easier to search, sort, and filter.

She reviews documents on-screen while she drafts the response in her word processing program. When she finishes the draft, she saves it to the DMS with proper client-matter information. It is then automatically included in the virtual file. She wants the client to review it, so she sends it to the firm extranet.

8:53 a.m.: Because the portal subscribes to a Web news service, it alerts her to a breaking news story. Reading it on the portal, she learns that a new court ruling could affect the patent applications of a few clients. She needs to e-mail those clients on the ruling's implications. Still in the portal, she opens a new message from Outlook (or another messaging application), writes her comments, includes the news story, and then e-mails it to her clients.

9:37 a.m.: Reviewing the newest documents from her practice group on the portal, she notices the latest revision to a missing-parts request that she had assigned to a junior associate. From the portal, she loads the document from DMS and adds a few annotations. She then saves it with annotations for the associate to see.

10:11 a.m.: A client calls to discuss the status of a new patent application and requests an update on the budget. While on the phone, our attorney selects the client and matter from her list on the portal. A page displays not only the latest notes, documents, and correspondence regarding the matter but also time and expenses. Tied into the accounting application, she sees not only her time and recent invoices but also billing information for other attorneys, paralegals, and support staff working on the matter. The client is happy to hear that they are under budget. When she hangs up, she writes a note about the conversation on the portal, which in turn stores it in the firm's contact resource management (CRM) application.

12:47 p.m.: During a lunch meeting, she receives an e-mail automatically sent from the portal to her BlackBerry. The portal monitors the progress of the docketing staff in processing the day's incoming paper mail: All incoming mail should be completed by 12:30, but there is still unprocessed mail. In response, the portal has automatically notified selected partners and support staff. A BlackBerry e-mail to the day's review attorney brings a reply that he is currently working with docketing to correct the situation.

2:19 p.m.: As she clears her docket throughout the day, her por-

tal provides continuous feedback, noting completed and uncompleted items. She notices one item marked uncompleted that she earlier directed an associate to finish. A call to the associate reassures her that he will be completing the item momentarily.

3:43 p.m.: Our attorney uses the portal to view her docket for the upcoming week. She sees that a couple of new applications need to be filed with the PTO in the next few days. She had assigned them to an associate and specialist. Since internal deadlines like drafts and administrative tasks are also stored in the docketing application, from the portal she can check the applications' status. Satisfied with their progress, she returns to drafting a memorandum to a client.

4:08 p.m.: Her own docket cleared, our attorney views the firm's docket on the portal. She finds five items outstanding, two that must be filed today. She calls another attorney and offers her assistance, but he is almost finished. She then checks on the other item, and after some e-mails are exchanged, sends her secretary down the hall to help. A little later, she notices on the portal that the final item is completed even before her secretary calls to tell her it's done.

6:30 p.m.: The firmwide docket now cleared, she checks the portal for clients who have not been contacted in the past two months. She notes which clients need a call or e-mail from her tomorrow before she closes the portal's browser and shuts down her computer.

The portal organizes information around the attorney's work, mitigating task and information overload. The portal provides this attorney with everything she needs to work and manage her practice throughout the day, so instead of fumbling with many different applications, she can focus on her clients. Furthermore, the portal plays an important role in quality control, risk management, and supervision as it allows attorneys to see beyond their own workload to the activities of the rest of the firm, building a self-policing community.

When properly designed with attorneys' needs in mind, portals can provide tremendous boosts in productivity, efficiency, and quality. That means happier attorneys and satisfied clients, and that is always good for the bottom line.

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