

SAGE  Wisdom Series



GREATER THAN THE SUM OF THE PARTS

How a Portal can maximize investments in enterprise applications

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Law firms have invested heavily in firm-wide software applications (“enterprise applications”) that have yielded significant improvements in productivity and efficiency, significantly increasing the information available to the organization. DMS (document management systems), RM (records management), DBM (database management), CRM (customer relationship management), accounting, messaging, docketing, and case management systems; this alphabet soup has become part of the lexicon of a modern law firm.

Yet these large systems have shortcomings: we burden attorneys and staff with more applications with steep learning curves; client and matter information is balkanized among various systems; technically sophisticated systems require expert staff, concentrating information in the hands of a few. These applications are excellent at the tasks for which they were designed, but for the attorney or staff member, such tasks constitute just a portion of their needs in the daily practice of law. Furthermore, systems are often purchased in response to some perceived need without any

strategic vision or appreciation about how these systems should be integrated. So while these systems have provided benefits to the law firm, the investments have not yielded their highest return.

So how does a law firm maximize its investment in these enterprise applications? Organize the information stored across all these systems around the attorneys needs and tasks, in other words, match technology with business practices.

This article originally appeared in the January 2005 issue of the ALA Capital Chapter’s Capital Connection newsletter.



This is possible with a Portal—in essence, a web site that pulls data and information from many sources and customizes it for a particular audience—in this case, an attorney or legal specialist. 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 your enterprise systems, rather, it consolidates data and presents it according to how an attorney or staff member works. Furthermore, Portals can be automated to create alerts, notifications, or take other proactive measures when deadlines are not met or certain thresholds are exceeded.

Portals overcome many of the shortcomings of enterprise applications while adding a great many benefits. A properly designed portal can:

- provide a client-matter, practice area, or firm wide perspective on all information rather than a particular information type (accounting, financial, records, documents, messages);
- organize data in ways meaningful to attorneys and staff, reducing time spent managing applications that is better spent applying their legal skills;
- make data widely available either by lowering the technical boundaries that restrict access or making it available outside of the organization;
- increase quality and performance through proactive monitoring, alerts, and/or allowing more people to review the data; and
- facilitate new business practices such as the paperless office.

Portal solutions come in variety of forms, from completely custom solutions to “prepackaged” solutions. Any portal solution, however, is *merely a framework that will require time and effort to be an effective tool for your organization*. Portals that wring maximum benefit out of your existing enterprise applications and productivity from your attorneys must be tailored to your work processes—there are no “out-of-the-box” portals.

Power to the People

A Portal should return the locus of information to people and how they work. Your firm views the world as a client’s matter or as a practice group, not as documents, e-mails, or financial information. Consolidate data from across your enterprise around the organizing principles of the typical workday of your attorneys and staff. The docket, for example, is the organizing principle for an Intellectual Property attorney. Client-matter may work best for your firm, or tax practices may use court calendars, while litigation may use cases as their organizing principle. Then, determine the common tasks they perform daily and what information is a priority for them.

A Client-matter view through a Portal combines billing information from your accounting system, documents from the DMS, and dockets or workflow from your case management application. E-mails, calendars, contacts, and tasks are included via the messaging application. Now the attorney has everything he or she may need to properly manage a case or effectively service a client. Providing data in this consolidated view enhances the value of each of the underlying applications than if it stayed locked in its native application.

This convenience is not limited to the office. Because its common platform is the ubiquitous web browser, such as Internet Explorer, a Portal can be available practically anywhere, anytime, provided it is properly secured. The data is now free not only from the bounds of the application, but also from the office. So if the attorney is at a client, on travel, or at home, they have access to everything they need.

Spread the Wealth

Unlocking data from the chains of its application confers a wide array of benefits in terms of

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productivity, quality control, supervision, and risk-management. Portals increase attorney and staff awareness of vital deadlines, events, and developments. Often, attorneys are only aware of their own dockets, having little to no knowledge of filing deadlines or other critical docket items for either their practice group or firm. Displaying the status of the daily docket via the portal in real-time—not only to the attorney, but also to the practice group or management as a whole—helps prevent missed filings or deadlines that often carry significant liability.

By making information widely available through a Portal, practice groups and firms can police themselves. Access to documents, billing, dockets, schedules, tasks and more allow colleagues and managers to ensure quality and a high-standard of performance. Reports on workflow, status, productivity, and other performance measures can be made available to management and—if practical—the practice as a whole: partners can ensure Associates and specialists are working efficiently and not exceeding a client's budget; case managers can track progress on filings; and senior management can easily verify that all daily docket items are completed. Where data was once limited to those with the skill and knowledge to extract it, Portals make it available to a wider audience with much greater effect.

You can also do this...

While a Portal is a medium to integrate information from a variety of applications and data sources, it can also possess a little intelligence of its own. Portals can be automated to send emails when thresholds are exceeded, display information based on a set of conditions, or facilitate the use of word processing, spreadsheet, or other programs. For instance, uncompleted tasks may be displayed a certain color, and failure to complete them will result in alerts displayed on the portal or sent via

email. Again, these should be based your business practices, whether for normal operations, quality control, or management.

Portals can also provide new functionality and facilitate new business processes. The paperless office, for example, comes a step closer to reality with a Portal. It provides the means to organize, view, and disseminate documents. A Portal screen may display the newest documents or documents pertaining to a particular client, matter, or project; or organize them according to meaningful conventions used by a practice group. Electronic documents available via a Portal not only save time and costs in the transit and management of paper files, but also allow faster searching through keyword searches, sorts, and filters specific to a practice group or firm rather than the arbitrary conventions of a DMS.

Design Is Critical

All Portal products on the market are frameworks—building blocks—for constructing a solution that works best for your organization. Considering that Portal products can cost from a few thousand to a few hundred thousand dollars, you should invest adequate time and resources to determine how your firm or practice group can best use one. Custom Portal solutions often work best because they are inherently tailored to your particular requirements and circumstances. Prepackaged Portal products often fail because of the misperception that they are an “out of the box” solution that will work immediately following installation.

Following are some guidelines for evaluating any Portal solution, whether prepackaged or custom.

- Understand how your people work, focusing on the user, not the technology
- Identify the organizing principle of the attorney's day and design to it.



- Can you build automation into the portal that enhances the value and functionality of the underlying data sources?

The underlying maxim of Portal design should be simplicity. A Portal solution should provide information to attorneys and staff intuitively and with a minimum of training or detailed explanation.

Greater Than The Sum of Its Parts

The advent of enterprise systems in law firms has put tremendous amounts of information at the firm's disposal. A Portal applies this information to more productive use, in the service of the attorneys rather than systems. This will allow your attorneys to be legal experts only, not technology experts as well. While a Portal consolidates information from a variety of data sources, it also serves as a platform for greater functionality and new business processes that creatively leverages existing data.

With the addition of a Portal, these various systems can be greater than the sum of their respective parts. Not only can your firm maximize its investment in these systems, but also it can realize additional benefits in productivity, organizational efficiency, performance and quality.

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