Business & Careers

Looking for efficiencies in a complicated system

Luigi Benetton
Hi-Tech

Remember that children's board game, Mousetrap? It's a Rube Goldberg machine that uses an unnecessarily large number of moving parts to catch a mouse. Part of the entertainment came from wondering whether the machine would effectively transfer the kinetic energy required to catch the mouse.

Now replace the board game with a law firm. Then replace the moving parts with redundancy and high-priced labour. You might now be describing many processes that keep modern law firms running.

All sorts of processes, from client intake to invoicing to discovery, involve data that travel through two or more systems. Unlike Mousetrap, a given event (like client intake) must catch several mice (like opening a case, creating an accounting file and setting up document-management folders).

Data often live in silos created by the specialized systems that store them. Making data flow efficiently between systems, and reducing any manual intervention required, only happens when those systems are integrated.

Larry Port doesn't know how those silos originally took shape, but he relates a plausible explanation for their continued existence: software vendors responded to the market.

According to Port, CEO of Rocket Matter, a legal practice management and time and billing application, software vendors who target large firms are more successful when they develop systems that cover fewer roles. The sale thus requires fewer approvals.

People in large firms typically perform specialized roles. When they do, they develop a "mental model" that helps entrench the systems they use. "The second you have specialized roles, it gets a lot harder to sell and the sales cycle gets longer," Port says. "All it takes is one person not liking one feature" for the sale to fail.

Integration of law firm systems takes several forms. There's the everyday integration nobody notices. For instance, the e-mail feature in Microsoft Outlook accesses the contact list so that people need not open a separate piece of software, copy an e-mail address and paste it into the "To" line.

Other tools can easily tie into popular systems.

"Our phones integrate into our Outlook calendars," says Andrew Feldstein, managing partner of Feldstein Family Law Group. "When somebody schedules an appointment in court, it immediately appears in Outlook at the office.

"It's so obvious you don't even think about it," says Feldstein of his firm's platform-agnostic mobile setup (two BlackBerrys with the remainder consisting of a roughly equal mix of Androids and iPhones).

More complex, but just as important, are integrations that allow separate systems to share information. Feldstein, for instance, integrates ProLaw and Worldox at his firm.

"Why do I want to pay someone to enter information for every file in two different pieces of software? That seems like a waste of their time.

"We also integrate ProLaw into our photocopy system so every photocopy gets billed to the proper file. That way, nobody has to manually enter the photocopies they take. They put the client file number into the photocopier for the copies they take, and the copies automatically go into the accounting system."

Sheldon Waters notes that law firms may also perform "one-off" integration exercises, like importing data into an e-discovery tool then de-duplicating that data. His company, DSM Computing Solutions, has written applications to handle such one-off needs.

System integration isn't as difficult as it once was.

"As more systems move to web interfaces with SQL (or similar) back ends (or developer-provided application programming interfaces — APIs), it becomes easier to synchronize data between systems without building customized bridges," says Dominic Jaar, KPMG Canada's national leader on information management and e-discovery.

Port concurs with Jaar on this point.

"For instance, a system might, via an API, allow 'outside' software to add, delete or edit a contact," he says. "The worst possible integration occurs when you must jimmy things together, work around the limitations of a system."

Ideally, "integration is transparent to the end user," Jaar says. "Adding even one click makes the integration more cumbersome and less likely to be successful."

An extra hurdle faces firms that use cloud-based services, since synching firm data to servers outside their firewalls gives them pause. (Pulling data from outside servers isn't as worrisome.)

In-house counsel face similar concerns when they field requests to integrate data from their law environment into the larger enterprise environment. For instance, information in an e-discovery tool should not become easily accessible outside the legal department. "You don't want privileged, confidential information synched back to the enterprise environment," Jaar says.

When Sheldon Waters works with law firms, he supports the practice software they choose, but "We're always looking to avoid islands of software and islands of data."

That avoidance helps fuel demand for "Swiss-Army-knife" systems that handle many different processes. Like Microsoft Outlook, they remove the need for certain integration initiatives. And in small firms, people often wear more hats than their large-firm counterparts, so they're open to such systems.

These systems aren't all-in-one, though. Port provides tools clients use to integrate Rocket Matter with tools that cover bases the application doesn't (like payroll, formal financial statements, payments to vendors and e-mail).

Jaar advises firms that embark on integration projects to consider other objectives too.

"Use this opportunity for data cleanup," he says.

Value: Lead by example

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Dana Schindelka, who chairs the Canadian Bar Association's wellness forum, says small firms and even larger ones can also outsource components to health and wellness service providers. Lawyers, he adds, can also access the lawyers' assistance program that exists in their jurisdiction.

"The legal assistance programs in each province vary greatly in funding, the services they provide, and the models, but they're largely focused on wellness at the grassroots level," says Schindelka, a lawyer with DLA Piper and chair of the Alberta Lawyers' Assistance Society.

Holly Stengel, a human resources and management consultant with myHRpro in Alberta and British Columbia, says she's seen improved morale and productivity and reduced absenteeism in companies she's worked with when employees feel senior management cares about their health and well-being. "Reducing absenteeism alone can save companies thousands of payroll dollars," she says.

However, Stengel cautions that it's counterproductive to offer wellness programs and still expect staff to put in 80-hour work weeks which effectively deny them a healthy work/life balance and needed time with their families.

"Telling employees is not the same as showing employees that their time is valuable and important to the company," Stengel says. "If a company schedules lunchtime meetings, the message to employees is that their lunchtime is really unpaid company work time."

Da Silva's sees value in the breadth of offerings, adding one caveat — that firms need to eschew the culture of macho performance for one where appreciation is expressed openly and genuinely and a healthy work/life balance promoted, where possible.

"Send a managing partner to yoga class," Da Silva says. "When you do that, you'll see the younger lawyers thinking that they can do that, too. And do this during the day — not at 5 in the morning or 9 at night."

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