The anatomy of a nicely automated law firm

By Rob Laird

The application of technology in the legal profession in Australia is building pace and momentum after many years of resistance. Aside from computerised accounting systems, the legal profession has struggled to come to terms with what technology can do for it. Even though the principles of business-to-business automation are old hat now, the legal profession is only slowly coming to terms with how best to make use of this now-proven technology.

This article looks at inbound telephony, dictation, client relationship management and outbound telephony, document automation, mailroom automation and billing. All of these

are meaty subjects that I can't possibly do justice to in such a short space, but I will endeavour to sketch some scenarios that will be familiar to lawyers.

INBOUND TELEPHONY

We have all been on the receiving end of this conversation at some stage: "I'm sorry, what was your name again? Where are you from again? Who do you want to speak to again? What matter was that in relation to again?"

To be nicely automated for inbound telephony, law firms should have a way of identifying who the caller is before answering the call. This can be achieved simply by

a computer interface to the 'caller-id' facility, by the firm's central client database, and thereby determining who the caller is and to whom the call should be directed.

With this capability, the phone receptionist is demonstrating a high level of personal and professional service by being fully aware of whom the caller has been dealing with, and the appropriate matter. It has been proven time and again how much a client's perception can change – positively and negatively – based on their treatment by a firm's reception.

Once the client call has been transferred to you, the lawyer, with clever use of technology you should be able to have your computer retrieve the client's matter details, and start timing the telephone attendance – ideally with a single click on the mouse. On completion, you should be able to set a diary note for a call back at a future date.

What happens when that future date arrives is dealt with below in the section on outbound telephony.

DICTATION

To be nicely automated for dictation, you need to have a digital dictation capture device (which could be your computer or a hand-held digital unit), software to manage the processing and archiving your voice files, and software to convert your speech into text.

Although this last step is not perfect, it does save time for an assistant who need only proofread and make corrections on the fly.

So our document is produced in an automated fashion, and is sent via email to the client for review.

CRM (CLIENT RELATIONSHIP MANAGEMENT) AND OUTBOUND TELEPHONY

Suppose the bring-up date has arrived. Now, the nicely automated firm's computer should retrieve that matter again, set the timer, and this time automatically dial the client's number for you. Of course, the computer will also record the time costing and billing data for the automated billing cycle. It should also quickly tell you how much WIP you have accrued for this client, and how much you can bill, and how much you have held in trust, and did I mention anticipated disbursements?

You can tell your client exactly where you are up to with their matter and exactly what fees have been accrued in an instant. Now if the client should ask, you know exactly where things are. Is that good service?

DOCUMENT AUTOMATION

If you have a single view of your client and matter, when it comes time to draft a standard letter, you should be able to 'click once' and have a letter template filled with all the relevant client and matter details. Another click and it is ready to go by email or is sent to the mailroom for processing.

Nicely automated firms have libraries of precedents and templates available at the touch of a button to lawyers needing to quickly produce high-quality documents for filing with third-party organisations and the like, and invest in keeping these electronic precedents updated. Once properly

established, automated documents can make substantial improvements in productivity; for example, by reducing drafting and addressing errors.

One of the biggest areas of potential automation for law firms is workflow – a subject big enough for a whole magazine, so I won't touch on it here.

MAILROOM – INCOMING

So how do you automate hard copy documents?

One of the good things about computers is that once you have an electronic image of a document stored in the computer, you no longer need to be where the physical document is located to be able to reference it. You can load your entire matter file on to your laptop and work from the client's premises, court chambers, or even the local café if you choose – some may laugh, but I can assure you that this has been happening for a long time. The concept here is what is loosely referred to as 'electronic single view of client and matter'.

To achieve this, all incoming documents should be converted to electronic format (if they are not already) in two steps – one captures the exact image via a scanner, and the second converts the printed word in that image into text that the computer can understand – this second process is often referred to as OCR – optical character recognition.

Once completed, you can search your database for specific words or sentences appearing in documents in a matter of seconds, and go straight to the sentence of interest. This is in contrast to having your clerk spend hours reading page after page after page … you know what I mean.

BILLING

As already touched on the CRM section above, nicely automated law firms have their billing processes well automated. Collection of the information required to produce a client bill is automated during the normal daily processes of recording file notes, writing letters, producing documents, researching legal precedents, and so on.

Bill preparation should be a by-product of a lawyer's routine – not an additional manual task.

CONCLUSION

"Half a bee, philosophically, must, ipso facto, half not be. But half the bee has got to be, vis-a-vis, its entity."

When it comes to such a broad subject, you can always rely on Monty Python to put into words what is almost indescribable, and while it may seem that prolific use of automation in the practice of law could immediately seem to be the domain of the larger, better-resourced firms, I would argue that it in 2005 and beyond, it is just as accessible and beneficial to even the smallest firms.

Embrace automation – its application for lawyers is reality. ■

Rob Laird *is Director of Business Development at LawMaster.* **PHONE** *(02) 4572 8699.* **EMAIL** *rlaird@lawmaster.com.au*