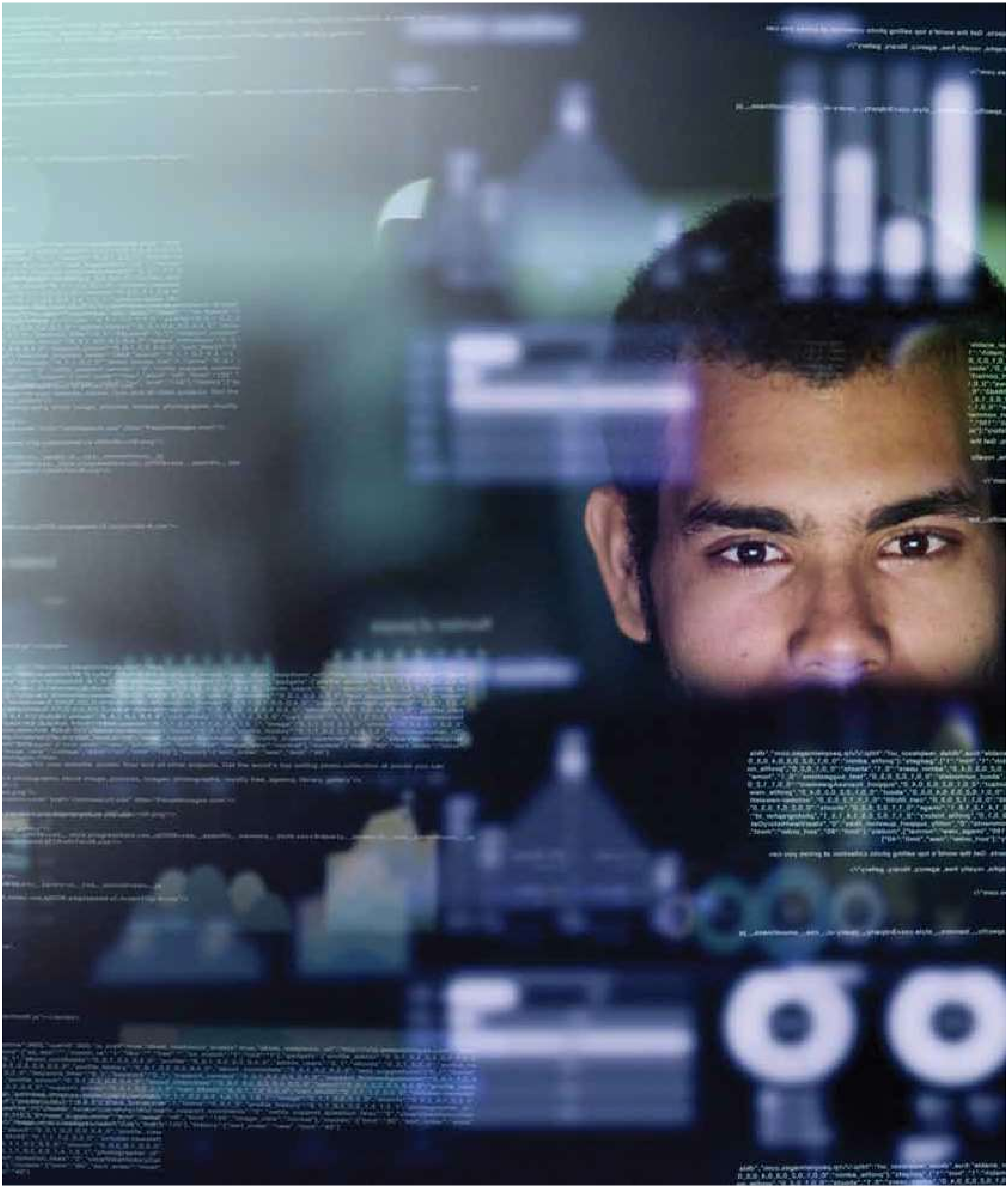

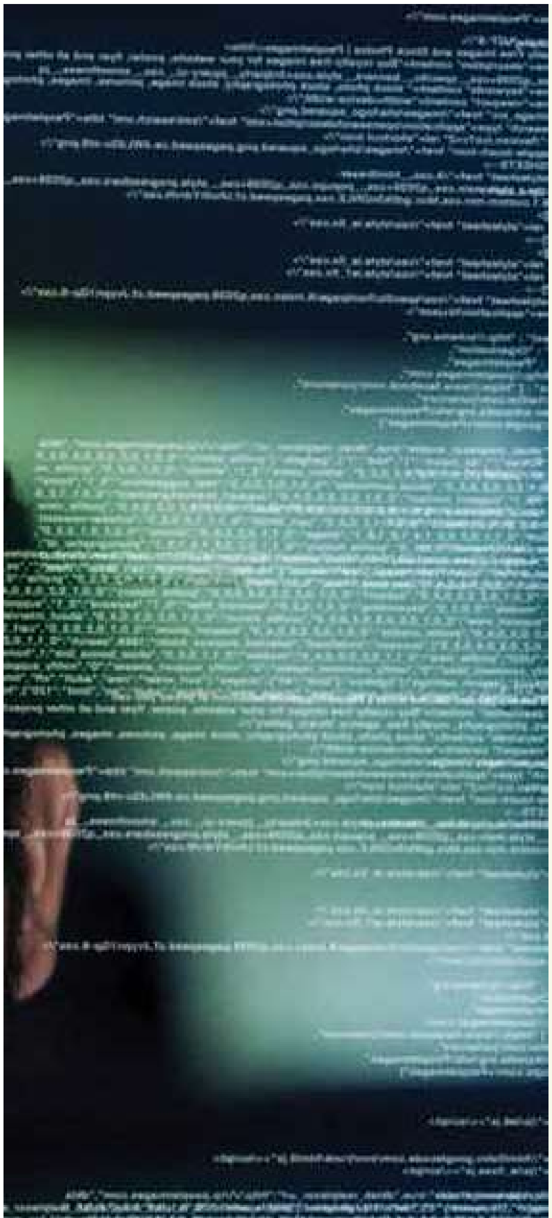

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AWESOME DATABASES
Capture, Track, Share

By Richard Marx

The approach to acquiring law practice software and technology often starts with questions such as: Who makes it? What does it cost? Is it in the cloud? Shouldn't we buy "X" software? Will it work with "Y" software? Is it safe? Will we really use it? All are great questions for later. But first we should identify what will be needed to really get the job done—not one little piece, but the whole enchilada. It's called a database. We put stuff in it, do stuff to it, and get stuff out of it. If we do it right, it makes us money, lots of money. The goal: Get everything we want and make it *awesome*.

AN AWESOME DATABASE: WHAT'S THAT?

At a meeting with a mixed group of business executives, I conducted a simple demonstration on how to recognize the challenges of managing information. We started a fictitious service business and acquired a reliable, inexpensive, and easy-to-use technology: Everyone received a legal pad and a pencil. We got off to a rocky start as we immediately had to call in a hardware specialist to provide a pencil sharpener, but soon we were on our way.

We assigned titles to our group from receptionist to CFO and role played a scenario with a single client from initial call to case closed. By the time we got our client through the first call, follow-up calls, case assessment, calendaring, correspondence, deadline tracking, billing, accounting, and management reporting, it became clear that we had a problem and that we were going to need some more legal pads. More importantly, we needed some systems to easily capture information coming into our "business," reports to track what was actually happening, and ways to share information both internally and externally. Once we had this all working efficiently, we would have our Awesome Database.

CAPTURE

As we looked over the numerous sheets of paper we had generated and passed around, our immediate consensus was that we needed a single data source for client and case management information that could be used throughout the company. Ideally, our system would allow the information to be input one time, and any changes or additions would update throughout the entire system. Let's not forget the complete picture—we need to capture e-mails, documents, phone calls, and whatever else comes our way. What would be really cool is to be able to have our prospects and clients do some of the work for us, filling out forms that could be incorporated into our data. Sounds like the beginning of a great relationship database.

Okay, so we start with PIM (personal information management)—we'll create a place to put just the contact's information, including name, address, e-mail, and other data, that is always true for our individual or organization in any context. Let's also classify our contacts and expand our PIM to include everyone we come into contact with in our business. Empty out the Rolodex, Outlook, spreadsheets, sticky notes, and other software data, and input them into our new system. It's okay, put in your hairdresser and the clubhouse for those all-important tee times. Oh, and let's design this so we enter our organization one time and link individuals to that organization, saving even more redundant input while we make our information more user friendly.

tasks, calls, e-mails, documents, notes, and whatever else we have on our plate for today/this week/this month? Because this is about sharing, we also should be able to see any combination of other staff's actions side-by-side.

I almost forgot that we will need to see what's coming down the road. Someone should have reminded me. Make it simple and include any action for today and for any future date that needs attention now. Share this so we can see anyone else's reminders as well. Put it all on a single screen.

Just imagine: Your office is efficient, the work is accurate, and everyone knows what they're doing.

We're moving on to case management. We may have one or more cases for each client, and we certainly have other contacts involved in each case. We will design our Awesome Database to allow us simply to link the contact information we already have input while showing us the specific relationship the contact has to the case. Here we will want a place to put important information regarding each individual case.

Now it's time to roll up our sleeves and start managing the practice. This means action—making phone calls, creating documents, scheduling events, and tracking those pesky deadlines. The same rules need to apply. We should be able to use the data already entered and link our actions to the contacts and cases. But it won't be perfect unless we can include e-mail, web research, snail mail, time keeping, and transactions.

TRACK

Well, we certainly have come a long way from our yellow pads, and we have lots of information to work with, so where do we go to work? Why don't we make a single view that can show us what events,

There are plenty of additional bells and whistles we can add to our system. The use of triggers (when *this* happens, make *that* happen) can help force procedures. Alarms and timers can help with the "no snooze rule" or help you time your nap. Other efficiencies can be gained when data can be inherited from one input source to another. What if all these actions you create to manage your practice could be transferred to your billing? With a good foundation of a relationship database, the bells and whistles can really be more than just loud noises.

SHARE

Sharing with other programs is a must. Integrating with word-processing, time-and-billing, and accounting packages, as well as personal devices and even the Internet, are good examples. Integration should support our original need to share a main data source and not lead to multiple databases that have irreconcilable differences. Our Awesome Database will have that.

Ah, but there is more to sharing than just our software systems talking to each other. *We* need to "talk" to each other.

In our exercise with our yellow pads, we discovered that sharing also included communication. My experience over the years has shown me that there are two simple types of communication: delegation and notification. Delegation is transference of responsibility from one person to another. Notification is interrupting someone with an in-your-face method of communication. In our Awesome Database, both are needed.

Delegation is really a preferred method but relies on some assumptions. You must have the authority to delegate, and the person on the receiving end needs to have the responsibility to complete the task. The communication needs to be clear. Due dates are nice, and priorities are even nicer. If everything that needs to be done is completed each and every day, then you won't need priorities. (Good luck with that.)

Notification works only when it is not overdone. If you stroll down the hall in your office and the Outlook e-mail notification is dinging at every workstation, you could have a flashback and think you're at the state fair. I know one thing for sure: The most clicked button throughout the day is *snooze!* Did you ever wonder what kind of not-so-subliminal message that sends? In one office, we had determined that the staff was being interrupted by notification more than 500 times a day.

All right, we'll just separate the two types of communication, and it will be awesome. Delegate to someone, and it shows up on their workplace screen, and they are responsible for getting it done without the interruption. Notify someone, if you must, and the system puts it in their face. No snoozing. Enough said.

What, there's more? Oh yeah, what about sharing with our clients? Share a document, share an event, share a task, and more. Share the case and give them a client portal so they can share with you. Man, that's a lotta sharing.

YOU KNOW YOU WANT IT

Who needs it? How do I get it? What does it cost? All are great questions. I'm glad you asked. Here are a couple of questions I like to ask: What is it worth to your firm? What are you willing to invest? It costs money. It costs time. It takes research. And you can't really be competitive without it. Also, you can't get it on eBay.

This is not a fairy tale. All of the aforementioned and more is available and being used in offices down the street and around the world. Below are a few considerations on your quest for your Awesome Database.

You could start by asking around and using the old "how'd you do that?" I don't know about you, but I can't even find a good plumber in the Yellow Pages. I do get quite a few referrals, so somebody's talking. Assess your needs or find someone to help you.

Don't use Band-Aids. They're sticky, and they keep coming off. Take a realistic look at the big picture. In addition to the financial aspect, it is important to take a hard look at your staff. I met someone once who actually liked learning new stuff. Where would you like to be in a year? Five years? Technology changes continually, so plan on it.

Hire professionals. I know that everyone has a brother who has a son who has a friend who is "good with computers," but come on—you're running a business here. Today's technology demands that the equipment and software work together. Hardware folks and software folks are most often two different animals. You may need one of each. Make sure they can work together in your best interests. Remember, it's still about sharing.

Size up who you're doing business with. The worst story I hear goes like this: *The guy who sold it to us was great. The guy who installed it was okay. The guy who trained us didn't know what he was doing. The guy who services us didn't show up.* Remember, sharing will work here, too. Meet with everyone who will work on your account. Get referrals.

A cataclysmic event is when everything happens at once. Disaster will strike your office if you try to implement simultaneously everything you eventually want done. One good gauge is to look at how much new training your staff can handle.

Speaking of training, you will need lots of it. A practice management system that requires little or no training probably doesn't do much. It's super-cool to ask "how will we be trained" before you ask "how much will it cost?"

It is a little-known fact that software companies do not write manuals for you. They write them for people they call Users. I guess they think it works out great for them because if you are already using their software, you don't really need a manual. Ask for a step-by-step procedure guide that is developed specifically for how you are going to use the software in your practice.

You don't want a drill, you just want a hole. I see clients who spend too much or too little. Budgeting really does work. Take a hard look at the value you want to create. Figure out how much you are going to spend, and then use two-thirds of that amount for your project. You'll feel better when unforeseeable project costs run over.

Have fun with technology. Yes, it can be fun! Just imagine: Your office is running efficiently, the work is more accurate, everyone seems to know what they're doing. Sometimes there are even neat gadgets involved. It's okay to smile. ■

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