

PROLAW CASE STUDY

STATE OF ALABAMA DEPARTMENT OF FINANCE, LEGAL DIVISION

PROLAW HELPS RENOVATE MATTER MANAGEMENT PROCESS TO
INCREASE EFFICIENCY



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RENOVATING A MATTER MANAGEMENT SYSTEM

The State of Alabama's Department of Finance Legal Division provides legal counsel and services to the Department of Finance and the Board of Adjustment (BoA). The eight-person Division maintains more than 40,000 records that track everything from managing litigation claims to assisting with contract negotiations and major economic development projects.

The Legal Division staff had been using manual and error-prone management methods to keep track of every development in a matter or claim. Physical files with an antiquated check out/in system and a disparate contacts database and email system caused inefficiency. Moreover, reporting on detailed statistics to the board members of the Board of Adjustment was nearly impossible.

When the old system reached a point at which it simply couldn't handle the amount of data, Yvonne Trafford, finance legal services administrator, turned to ProLaw®. ProLaw provides a fully integrated practice management solution that helps government agencies automate the practice of law and increase productivity.

"We wanted a better way to organize and track our matter and claim related information and easily find what we needed. In other words, we needed to reengineer our matter management system in order to increase overall efficiency," shares Trafford.

PROLAW SUPPORT EASES ROLLOUT

When ProLaw was implemented in October 2008, Trafford planned a phased rollout to ensure every person in the Division was proficient with the system. BoA was first in line. The Division's 30,000 records were easily converted into ProLaw matter records and its new claim process was active starting in January 2009. The Legal Division now has its new matter process set up in ProLaw, and the legal staff will be trained on new features as they are rolled out.

"We can't say enough about the high-quality service and support we received during our implementation process. The instructors and account representatives were instrumental in ensuring ProLaw was up and running to our satisfaction."

Yvonne Trafford
Finance Legal Services Administrator

Trafford and her team really liked how ProLaw can be customized to match the Division's specific workflows. For instance, the new claim and new matter process has been replicated in ProLaw so that the same information is entered and lawyers follow the same response procedures. Not only does ProLaw ease training and adoption, it provides a centralized and automated system to track and report on a host of variables.

The ProLaw training offerings complemented the Division's rollout plan. Along with the intensive three-day onsite training, every staff member was assigned a ProLaw online education course to complete on specific topics. Finally, when the Division went live with the system, a ProLaw trainer came back to address individual users' issues.

"We can't say enough about the high-quality service and support we received during our implementation process. The instructors and account representatives were instrumental in ensuring ProLaw was up and running to our satisfaction," says Trafford. "Additionally, we were very impressed with how smoothly the conversion process went and how quickly the staff adapted to it."

STATE OF ALABAMA DEPARTMENT OF FINANCE, LEGAL DIVISION

With eight legal and support staff, the Legal Division provides legal counsel and services to the Department of Finance and the State Board of Adjustment, managing more than 40,000 records.

STRATEGIC GOALS

To reengineer its claim and matter management system for greater efficiencies.

WHY PROLAW?

ProLaw provides features geared for government legal agencies to more efficiently manage their workflow.

RESULTS

- Immediate efficiencies in daily tasks
- More organized and prepared staff
- Better reporting capabilities providing greater visibility

“Once the attorneys realized the type of reports we could produce, they simply wanted more data. ProLaw allows us to develop custom and ad-hoc reports to keep up with demand. And we’re just getting started.”

Buddy Jackson

State PMO Project Manager for Information Services Division

FAVORITE EFFICIENCY FEATURES

The ProLaw implementation team included Buddy Jackson, state PMO project manager for Information Services Division, and Anita Hunter, administrative support assistant. Together with Trafford, they have championed the effort to ensure ProLaw addressed the firm’s needs. Some of their favorite features include:

Docketing – Procedures for the legal staff are highly regulated, requiring staff to adhere to numerous timelines. Hunter implemented a docketing system for new matter intake and new claims that provides pop-up reminders when responses or actions are due. She was impressed with how simple it is to set up custom reminders and to design the events tab to display the most pertinent information. Hunter also tracks how documents flow through the process, so at any point in time, she can look in ProLaw and determine where a document is, who has it, where it should be tomorrow and so forth. This enables her to produce a report that determines if the lawyers are meeting their obligations.

Matter management – Now that all matters are managed in one central location, everyone has access to the same information. Entering information once saves time and ensures everyone is looking at the same data. Hunter really likes the ability to drag and drop relevant materials directly into the matter, such as emails and attachments. Now in the initial steps of moving away from 100% paper-based files, Hunter is beginning to scan more and more forms, letters and other physical documentation in order to tag them to the matter and maintain a complete electronic file.

Query system – Being able to quickly search and retrieve specific information is a huge advantage for the Division. Flexible search options allow the team to search on just about any criteria—matter ID, key words, wild card, etc.—

and leads them directly to the information they need. In the past, staff had to manually search physical files, which were often in two or three different office locations, to find specific documents.

Document assembly – The BoA uses about 30 different types of documents on a regular basis to communicate on the status of claims, such as Notice of Hearings letters. Admin staff takes advantage of ProLaw’s automated document assembly process to produce documents faster and reduce any data input errors. Templates were easy to replicate with drag-and-drop fields and they easily merge with information from the ProLaw database on demand. “We just love it!” says Hunter.

Reporting – The BoA staff runs a variety of reports on hearings and quarterly status updates. For example, the Hearing Docket report equips the lawyers with complete details on each hearing in a single report, which is something they were not able to produce prior to ProLaw. In fact, the staff is receiving more and more report requests. “Once the attorneys realized the type of reports we could produce, they simply wanted more data—either in a different format or with new variables. ProLaw allows us to develop custom and ad-hoc reports to keep up with demand. And we’re just getting started,” says Jackson.

SCRATCHING THE SURFACE: EXPERIENCING INITIAL BENEFITS

As soon as ProLaw was implemented, the Division experienced immediate efficiency benefits in daily tasks. Staff is able to easily track and search claim and matter information and produce highly accurate documents faster and more efficiently. The staff is also much more organized and enjoys the ability to quickly pull up information and answer questions. This helps with overall satisfaction: The lawyers feel more prepared with their hearings and matters and claimants receive responses more rapidly.

“We certainly accomplished our goal of reengineering our matter management system for improved efficiencies, even in these early phases with ProLaw,” says Trafford. “We now have a level of visibility into our processes that will continue to transform how we operate.”

The Division is obviously doing something right, because other state departments are looking into how they can benefit from ProLaw too.

For more information about ProLaw, please call **(800) 977-6529** or visit prolaw.com.