

**PROLAW CASE STUDY**

# OSBORN REED & BURKE, LLP

PROLAW HELPS FIRM STAY AHEAD OF CLIENT EXPECTATIONS



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## PROLAW HELPS FIRM STAY AHEAD OF CLIENT EXPECTATIONS

Osborn Reed & Burke, LLP has been in business since 1916, and its adoption of technology has been a key reason for its longevity. Headquartered in Rochester, NY, the firm has found its niche with 13 attorneys providing legal services in defense litigation, family law and real estate, among other specialties. Even though they are a smaller firm, they have the ability to quickly respond whenever a new expectation is presented from a client.

“In order to meet client expectations, we have to be accessible and deliver quality work product. In the era of instant gratification, those expectations are increasing all the time. We need to be ready to react,” says Sue Miller, Legal Administrator.

The firm considered purchasing several different options at the time, but realized that the end result would have been a makeshift system with disparate applications and information stored in isolated databases. ProLaw was the first—and continues to be—the legal industry’s leading integrated software to automate the practice and manage the business of law. Miller recognized how Osborn Reed could benefit from that powerful combination.

### ACCOUNTING SETS HIGH STANDARD FOR MATTER MANAGEMENT

ProLaw was initially rolled out in the accounting department, which has been a good litmus test for the rest of the firm. The department uses ProLaw for all time and billing functions: general ledger, AP, AR, check writing, collections and financial reporting. They especially benefit from the ProLaw capability to process multiple client invoicing requests. In addition, accounting takes advantage of ProLaw’s integration by using front-office matter management functions.

“We keep track of all billing-related notes, documents and other ‘out of the norm’ information within each matter,” shares Miller. “Once this information is tagged to a matter, it is easily searchable and keeps our financial records

complete and organized.” The department even leverages the customizable tabs to capture specific information for electronic billing or statement requirements in order to easily meet client demands.

Taking their cue from the accounting department, Osborn Reed’s real estate department has established their own workflow process to streamline activities for different transactions—from documents and forms to events. For example, a resourceful paralegal set up the sequence of events required for matters like refinancing or real estate investment trusts within ProLaw Events. Activities and deadlines would automatically appear on the attorney’s Outlook® and ProLaw calendars. To support that timeline, they also customized tabs or fields in ProLaw to capture specific data to easily create applicable documents.

### THE POWER OF REPORTING

Miller raves about conducting and saving queries on just about anything within ProLaw. “I love having readily available information at my fingertips. All my queries are built in the system, so producing our regular reports requires just a few clicks. Being able to convert reports into PDFs, which are easy to read and send via email, is wonderful,” says Miller. She can also easily field ad hoc report requests and turn them around in minutes.

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**Sue Miller**  
Legal Administrator  
Osborn Reed  
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### OSBORN REED & BURKE

Headquartered in Rochester, NY, Osborn Reed & Burke has been providing a wide range of legal services since 1916. The firm’s attorneys have included a mayor of Rochester, Supreme Court justices, and a Monroe County legislator.

### MISSION

Invest in technology that enables efficient, accurate and cost-effective service to meet client demands.

### WHY PROLAW?

ProLaw’s integrated financial and practice management system provides one central database and eliminates the need for third-party software for core functions.

### BENEFITS

- Tighter control of financials
- More efficient response to client demands
- Higher personal accountability
- More timely and accurate time capture
- Excellent case management tools

**Encouraging Time Entry**

One report that attorneys pay close attention to is the Missing Time report. "No one wants their name to appear on this report!" says Miller. Highlighting missing time by staff member clearly encourages more diligent time entry. ProLaw's intuitive time entry functions make this process easy and more accurate.

Previously, some attorneys would manually write out their time entries in a Word file or dictate time entries that then were transcribed by support staff, who would enter the data into the system. These entries would then need to be reviewed and approved by the attorney. "Directly entering time into ProLaw saves time for the attorneys and their support staff. It also eliminates lengthy revisions on pre-bills," explains Miller.

**Highlighting Essential Dockets**

Within Osborn Reed's Defense Litigation practice, ProLaw's docketing comes second nature to its lawyers. To match the work style of the firm, Miller distributes daily Uncompleted Dockets reports that serve as an additional reminder to help attorneys prioritize their day.

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Sue Miller

**Analyzing Financial Health**

Miller is tasked with generating monthly reports reflecting the health of the business. Accounts Receivable Aging, Work-in-Progress, Revenue Analysis and Fee Analysis reports are produced to highlight relevant data for firm management. The ProLaw centralized database and simple reporting tools enhance the reporting functionality with the ability to customize and drill down on certain data elements, presenting multiple perspectives.

The Fee Analysis report, for example, provides granular detail on what has been billed by areas of practice, the value of those hours, total amount billed month-to-date and fiscal year-to-date, what has been written down and the effective billable rate. This can also be grouped by originating attorney, by department, by billing attorney and even by client. Miller can customize views on all reports based on individual preferences, such as including matter numbers.

ProLaw's built-in Report Writer is a powerful tool to design the firm's reports, yet is easy enough to manage without the help from IT resources.

*"Having one integrated system is a huge benefit. Not only does ProLaw ensure front and back office applications work together, but also allow us to maintain a single database."*

Sue Miller

**TIGHTER CONTROLS ON THE BUSINESS**

Without a doubt Miller credits ProLaw in creating tighter controls of the financial status of the firm. Regular reports and matter management tools have yielded higher personal accountability and more responsive and efficient client service.

"Our staff wants to better understand the financial numbers and how they can positively affect them. A more engaged staff definitely equals a more productive and profitable business," adds Miller.

Miller, who has helped lead the ProLaw effort since the initial launch, notes that ProLaw benefits have continually remained the same. "Having one integrated system is a huge benefit. Not only does ProLaw ensure front and back office applications work together, but also allow us to maintain a single database."

Osborn Reed has continued their philosophy of readiness by recently upgrading to ProLaw Version 11.

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