

## **PROLAW CASE STUDY**

# FABYANSKE, WESTRA, HART & THOMSON P.A.

PROLAW IMPROVES FIRM PERFORMANCE WITH INTEGRATED SYSTEM



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## PROLAW IMPROVES FIRM PERFORMANCE WITH INTEGRATED SYSTEM

### FINDING THE TECHNOLOGY PLATFORM THAT IS THE PERFECT FIT

The team at Fabyanske, Westra, Hart & Thomson P.A. (FWHT) considers the firm to be just the right size for providing legal services to the finance, real estate and construction industries in greater Minneapolis. With 38 attorneys, the firm is a boutique that focuses on excelling in a select number of practice specialties, rather than being a full service firm that seeks to be all things to all clients. Its smaller size allows the team to be more responsive, more service oriented, and less expensive than the typical large law firm.

This philosophy has also been applied to the firm's adoption of technology. To remain competitive and enhance client service, the staff prefers to implement leading edge rather than "bleeding edge" technology. Effective practice management has always been a priority, so when the firm's existing applications needed to be replaced in 1997, the team selected ProLaw® because its capabilities were ideal for FWHT's size.

ProLaw is a comprehensive financial and practice management system. Built from the ground-up on a unified database, ProLaw combines case and matter management, as well as time entry, billing and accounting capabilities, all within a single integrated solution.

The firm's prior case management system was simply not scalable for its growing client base, and it constantly crashed when overloaded. In addition, the developers of the previous accounting system were not confident it could survive the Y2K scare. All of which led the firm's technology committee to choose ProLaw.

"ProLaw was just the right size to meet our current and future needs," says Stephanie Scheu, Office Manager, who was on the evaluation committee. "We wanted to upgrade our platform and immediately saw the value in integrating front and back office functions. Plus, ProLaw offered an entire menu of features that we could adopt when ready. Now ProLaw is such a huge part of our day, we literally could not do our jobs without it."

An added bonus was the ProLaw flexibility in matching individual workflow preferences. "Everyone does things a little differently," confirms transactional attorney and shareholder Steven Cox. "ProLaw provides the right feature set to accommodate most work styles, enabling us to deliver excellent client service."

*"We wanted to upgrade our platform and immediately saw the value in integrating front and back office functions. Now ProLaw is such a huge part of our day, we literally could not do our jobs without it."*

Stephanie Scheu  
Office Manager

### THE HEART OF THE MATTER

One of the important features of the ProLaw case and matter management solution is that it accommodates work styles yet enforces standardization. After performing a conflicts check through ProLaw, a new matter is set up in the system. Then staff enters time and manages all matter-related items in the central ProLaw database.

At the heart of this process is the document management system. All documents are created and stored with a unique ID number and tagged to the relevant matter in ProLaw. Because documents are organized in the central database, everyone has access to the files. Not only does this allow for easy searching and retrieval of documents, it creates a knowledge management repository where staff can leverage existing firm assets to increase efficiencies and improve consistency. Instead of reinventing the wheel each time a document is created, the staff is able to access previous files to understand best practices at the firm.

### FABYANSKE, WESTRA, HART & THOMSON P.A.

The 38-attorney firm serves clients in the finance, real estate and construction industries, and in the areas of commercial litigation, financial restructuring, bankruptcy, tax and business planning with offices in Minneapolis.

### STRATEGIC GOALS

To find the right system for case and matter management that met current and future goals.

### WHY PROLAW?

Built from the ground-up on a unified database, ProLaw combines case and matter management as well as time entry, billing and accounting capabilities within a single integrated solution.

### RESULTS

- Highly scalable platform to accommodate firm growth
- More efficient and organized matter management
- Streamlined workflow between attorneys and support staff
- Improved cash flow with higher visibility into client financials

“It’s great to easily help each other on similar matters by simply searching through the documents tagged in ProLaw,” adds Cox. “Plus I really like having all my documents in one place with flexible options to organize. ProLaw’s nesting feature allows me to arrange drafts of the same document in one place where I can specify work-in-progress files at the top. Everyone does it a little differently depending on how they like to organize.”

Attorneys also gain confidence knowing their documents are all backed-up in ProLaw rather than at their local workstations.

One of Legal Administrative Assistant Sherri Sablak’s favorite ProLaw features is the ability to classify events in matters. She is able to organize litigation matters into very specific categories—motions, summons, complaints, notes—within each matter, based on a customizable drop-down menu. “Not only does this keep the matter extremely organized, but also makes it easier to find a document because I can conduct a search within a category,” says Sablak.

**Task Management through Microsoft® Integration**

Because email is the first choice of communication between attorneys and clients, the FWHT staff needs to efficiently handle the constant stream of electronic communications and attachments. ProLaw’s Pro Filing™ functionality enables them to permanently save emails—with subject lines, sender/recipient names, and attachments—to the corresponding matters without leaving Outlook™.

For Cox, the Pro Filing process has streamlined the conventional Outlook “Inbox” and “Outbox” functions. Once he has completed the necessary task associated with the email, he Pro Files it in ProLaw. “Instead of managing thousands of emails in my Outlook Inbox, I just save them as a permanent file in ProLaw with a click of a button,” says Cox. “Managing my emails this way helps trigger my to-do list on a regular basis so I don’t miss any deadlines or important developments.”

**Additional Favorite Features**

**ProLaw Dashboard** – ProLaw is integral to the daily tasks for support staffers Sablak and Mary Allen, Application Support Specialist, which is why they rely heavily on the ProLaw Dashboard. The Dashboard provides key shortcuts to everything in ProLaw. “I have it open all day for quick access to information as I routinely respond to ‘Please find me..’ requests from my attorneys,” says Sablak. Allen also has the Dashboard open on her desktop throughout the day and especially loves the recent matters and documents button. “It is very convenient to access the information you know you want without having to open the matter first,” adds Allen.

**Integration with Adobe®** – From within a PDF file, staff is able to click a button that attaches it to the appropriate matter within ProLaw. This lets staff bypass the extra steps of finding the contact or matter in ProLaw first. Plus, they are able to convert any Microsoft Word™ document to a PDF with no additional software. “I love this button!” says Sablak.

**Easy Time Entry** – The ease of use encourages attorneys to enter their own time directly in the system. Cox keeps his “Today’s Time” bar always open so he can input his time daily to ensure the accurate number of hours and descriptions of his services. For administrative assistants who are entering time for their attorneys, the comprehensive ProLaw capabilities provide numerous avenues for entering and obtaining information.

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*“We forget how limited our old systems were after using ProLaw for so long!”*

**Sherri Sablak**  
 Legal Administrative Assistant

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**OBVIOUS EFFICIENCIES**

Even without any official statistics, everyone agrees that their daily workflow is much more efficient with ProLaw’s integration of front and back office functions. Streamlining tasks within one system is a huge time saver and ultimately allows attorneys to increase their billable time. Cox even considers himself “spoiled” with all of ProLaw’s features that have become a routine part of this day.

The admins appreciate how ProLaw has improved the workflow between themselves and their attorneys. Because of the transparency of the system, they each know what the other is doing or has completed. They have developed a daily routine that is second nature. “We forget how limited our old systems were after using ProLaw for so long!” adds Sablak.

Finally, the staff can attest to improved cash flow due to their ability to get invoices out earlier and attorney’s access to up-to-the-minute client financial details. “I frequently query my client’s financial status to understand the hours we’ve billed, what my clients owe and when they’ve paid,” shares Cox. “Having this knowledge throughout the month helps me manage my time and alerts me to any potential issues.”

## REINFORCING THE POWER OF PROLAW

Allen, who is the firm's main ProLaw administrator, is also responsible for training. In addition to training new hires on the system, she holds monthly refresher sessions on basic functions as well as on more advanced capabilities for the firm's power users. Since the admins are typically the heaviest users, she finds that they are a huge influence on how the attorneys use ProLaw. If she can get the admins to see the benefits of shortcuts or filling out all fields in the matters or contacts database, their attorneys will generally follow suit.

Allen has also found the importance of a pilot group to test major new features or upgrades rather than rolling them out to the entire firm at once. The firm is currently testing ProLaw's docketing system as a more comprehensive and centralized approach than relying on the attorney's Outlook alone. She is also working with a group to evaluate the new features for the version 11.11 upgrade, such as the enhanced Pro Filing capabilities that make it even easier to manage emails and attachments.

"I am always looking for more features we can take advantage of to manage the firm more efficiently," says Allen.

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