

**PROLAW CASE STUDY**  
OSBORNE &  
HELMAN, LLP

PROLAW BRINGS A SMALL FIRM CLOSER TOGETHER



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# OSBORNE & HELMAN, LLP

It was a classic scenario that could have easily fit into the popular *Who Moved My Cheese?* book by Spencer Johnson, M.D. The 30-person firm of Osborne, Lowe, Helman & Smith L.P. of Austin, Texas, was in the middle of overhauling its computer hardware, operating system and software when the organization decided to split into two distinct firms. The firm, however, embraced new technology and new software programs that resulted in streamlined business processes and a new functional approach for the two new entities.

### THE NEED FOR OFFICE UPGRADES

When administrators at Osborne, Lowe, Helman & Smith decided to purchase a new office management system and a new case management system, they knew they would need to upgrade their operating system from DOS to Windows®. This required the organization to buy new computer hardware and to abandon WordPerfect® for Microsoft® Word. To help manage these changes, the management team committed resources for training on all new software, which was to be part of the upgrade.

Leading that change, firm administrator Jo Ann Seale-Welch began researching case management solutions. She narrowed the choices to three packages, but in the end only ProLaw® proved ideal for the firm’s needs. “ProLaw offered the only truly integrated package on the market, and that integration supported our desire to pull our firm more closely together under one technological umbrella,” says Seale-Welch. “Also, we found it to be competitively priced within the industry.”

Having selected the case management software, the firm began to transition from DOS to Windows. This is when the firm underwent an unexpected split into two distinct, smaller firms. “Though divided by business philosophies, we still shared a commonality – the decision to use ProLaw,” she says.

### TRAINING: KEY TO USER ACCEPTANCE

Managing a firm split, and the task of implementing new computer hardware and software across the board at Osborne & Helman, was a major undertaking. However, the firm’s management team decided to embrace change with resolve, humor, and a comprehensive training plan. One of the managing partners cheerfully volunteered his office space for on-site Windows, Word and Excel training. To whip up enthusiasm for the ProLaw launch the firm also held parties wearing zebra shirts and hats, part of the time-tested ProLaw brand look, and hosted Q&A sessions to generate positive attitudes about the new case management system.

To prepare for training and the ProLaw software rollout, the firm attended a ProLaw user conference. “There’s no better place to gain perspective on a piece of software than in a concentrated gathering of its users,” says Seale-Welch. “And that’s exactly what we needed.” She says the educational sessions offered a broader, more detailed picture of ProLaw’s capabilities. Conversations with other attendees during breaks and social gatherings added end-user feedback that she says helped immensely during their rollout.

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Prior to the ProLaw trainers coming on-site, Osborne & Helman’s staff worked with the evaluation copy to become familiar with the fundamentals. Between working with the

### OSBORNE & HELMAN, LLP A BOUTIQUE

30-person firm in downtown Austin, Texas, focuses on domestic estate, probate, and international wealth planning. The firm also is active in the areas of taxation, business planning, estate and trust administration, litigation, charitable planning, and real estate transactions. The firm has earned a respected reputation in its practice areas throughout the state of Texas and around the world.

demonstration copy and attending the user conference, they understood enough of the basics to hit the ground running when the ProLaw trainers arrived. Training was tailored so that users learned the relevant tasks to do their job. In addition, teams were formed to design ProLaw use plans based on the firm's work flow and business procedures.

### THE ROLLOUT: DEFINING ROLES AND THE INITIAL SETUP

The firm's employees demonstrated considerable personal initiative to prepare for the ProLaw rollout. One staff member became the Front-Office specialist and continues to be responsible for creating and entering forms into ProLaw. She also trains new employees on ProLaw's Front Office features.

Another staff member became the Back Office guru and also trains new hires on that portion of the software. As the owner of the Back Office features, she ensures that contact records are clean and that the opening of new matters is handled consistently. This gives the firm greater confidence in conflicts checking, as well as assurance that the database is organized in the best way possible.

To provide further consistency to the ongoing data-entry process, Osborne & Helman designed an online intake form that legal assistants complete and e-mail to the Back Office manager when opening new files. The form looks like the ProLaw Matter screen, so entering data into ProLaw flows smoothly.

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Training didn't end when the ProLaw trainers left for the airport. The lessons they shared allowed for more and more exploration of the software as users, who range from novices to experts, made discoveries of their own every day. "Cries of delight, followed by a flurry of employees gathering around the user who'd just discovered something cool and helpful, were the norm for a long time," says Seale-Welch. As staff gained proficiency, their appreciation of the solution increased knowing that data sources were now pulled together via one integrated database.

More than four years have passed since Osborne & Helman adopted ProLaw. The firm has realized greater efficiency, confidence in practice management procedures, and the power to compete with larger firms. "Most of all, our firm is a much closer group of professionals since we've integrated our business under ProLaw," says Seale-Welch. "As an administrator, I believe we have accomplished something highly worthwhile that goes above and beyond day-to-day business. This is a very good thing in my opinion."

### POST-TRAINING: USERS APPLAUD PROLAW

Seale-Welch says the organization is now at a place where it can truly appreciate having all of the firm's data under one technological umbrella. "All of the tangible benefits notwithstanding, I believe that the greatest benefit to using ProLaw has been how it has pulled our entire firm – all user groups and various practice areas – together into a community of colleagues," she says. "We all speak the same practice management language now and share our knowledge as we progress."

### BILLING PROCEDURE

ProLaw has helped make the billing procedure smoother than it's ever been at Osborne & Helman. Users enter their own time, which saves approximately one full administration day every month. Seale-Welch says they billed their first cycle using ProLaw after only training on ProLaw for approximately six weeks. Everything went just fine. "That was a pleasant surprise, because we expected the first couple of cycles to have a few kinks," she says. "Now if we ever have delays during monthly billing, it's due to staff, not software."

### CASE MANAGEMENT REPORTING

The partners at Osborne & Helman enjoy the comprehensive management reporting and generate their favorite reports on a daily basis. The firm's financial partner is pleased with how easy it is to retrieve data from ProLaw. The critical information required to form a financial position opinion is available at the push of a button, and obtaining data is quick and easy in preparation for weekly partners' meetings.

### CASE ANALYSIS

Analysis of individual cases at a given moment has become very straightforward for Osborne & Helman attorneys. The data for every case is updated daily within ProLaw. Any attorney can instantly assess the real value of potential settlements and make good decisions on the client's behalf. With all of the relevant financial information for each case housed in one database, within each matter, there's no

delay in gathering relevant financial information. The attorneys frequently use the Inquiry tab, which connects directly to a client's billing and payment record. They also enjoy how ProLaw's flexibility allows each attorney to sort case data exactly the way he or she wants to see it

#### FILES MANAGEMENT

According to Seale-Welch, saving time is one of the consistent benefits to using ProLaw. The staff at Osborne & Helman is using the Files management feature to keep track of off-site records and on-site case files. Users can now track the location of these files in ProLaw, which saves time and energy. Using this feature has revealed how much time they previously spent locating case files, compared to how little time is spent on this task now. Also, the firm no longer has to deal with multiple forms repositories scattered throughout the office. Now everyone shares the various forms that are housed on ProLaw, which has resulted in time efficiencies and more consistent work practices.

#### CALENDARING CAPABILITIES

The firm also uses ProLaw's Calendar capabilities. Staff has created rules sets that mirror work flow timelines, generate reminders of tasks and deadlines, and in general, automate a tedious, yet essential, part of law practice. Users know that on every matter, their event listing will be organized in exactly the same way, so there is no delay in retrieving case data.

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