

PROLAW CASE STUDY BOYNE CLARKE

PROLAW IMPROVES PRODUCTIVITY FOR A COMPETITIVE EDGE



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BLAZING NEW PATHS WITH PROLAW

Boyne Clarke has built a successful law firm by fostering its entrepreneurial spirit and innovation. The firm has blazed new paths throughout its history and is now the largest private employer in downtown Dartmouth. It is the largest law firm in Dartmouth and the fourth largest in Atlantic Canada with 140 staff that includes 45 lawyers.

In 1998, the firm was faced with an older accounting program that lacked Y2K compliance. Furthermore, Boyne Clarke's system for managing matter and case files was an inconsistent and isolated exercise. No standardized protocols existed for naming or saving files, and lawyers kept their own password-protected directory tree on their own computer, often using arcane filing methodology. No central repository existed for documents or case details, creating significant problems when the responsible lawyer was out of the office or unreachable.

While replacing the accounting system was a top priority, firm leaders realized they could also increase efficiency with case management. As a result, they expanded their search to find a more comprehensive solution. They quickly discovered that ProLaw® met their stated goals: It could be customized on a practice group basis; it integrated with their email and calendaring system; and it offered robust organizational features to accommodate their current and future needs. Finally, ProLaw could increase firm-wide efficiency and equip Boyne Clarke with the cutting edge technology they needed to serve their clients.

"ProLaw has given us a major competitive advantage from a client service, business development and a staff retention perspective."

Greg Short
Director of IT
Boyne Clarke

In 2000, Boyne Clarke, true to its entrepreneurial spirit, became the first Canadian law firm to implement ProLaw. As a result, it played an important role in the Canadian practice community by incorporating Canadian accounting rules into the system, such as harmonized sales tax (HST) and full accrual accounting, which encouraged other Canadian firms to follow suit.

Now staff feels they have "bragging rights" on how they've leveraged the power of ProLaw, including the development of some unique applications. "ProLaw has given us a major competitive advantage from a client service, business development and a staff retention perspective," says Greg Short, Director of IT.

TRANSFORMING BUSINESS PROCESSES

Centralized Access to Information

ProLaw's "One Office" philosophy has been a significant benefit to the firm. "It's about having all information relating to a case or client at your fingertips," says Diane Norris, Executive Director. The ability to access any detail relating to a case—from anywhere, at anytime—has been an asset on a number of fronts.

For example, centralized case and matter management has reduced administrative steps. By only entering information once, it provides an up-to-date picture of the client and every related matter. Authorized staff can access the complete electronic file, including calendar events and tasks, notes, documents and even payment status all in one place. "ProLaw's case file organization and access is 180 degrees different from the previous systems we had in place," says Norris.

ProLaw maintains all of Boyne Clarke's contacts in a central database, making it easy to locate contact details and keep them universally updated. This system also makes it easy to track and plan marketing activities. "We can get very specific on our outbound marketing communications versus mass mailings. We can search on all doctors within a certain postal code area to promote our healthcare practice. This has become a very powerful tool for the growth of the firm," says Short.

BOYNE CLARKE

Boyne Clarke is headquartered in the Dartmouth area of the Halifax Regional Municipality, Nova Scotia and offers services in nearly 30 different practice areas to its business, institutional and personal clients. It is the fourth largest firm in Atlantic Canada.

CHALLENGE

Modernize the accounting program while integrating comprehensive case- management capabilities.

WHY PROLAW?

ProLaw integrates financial and practice management functions with flexible customization tools and robust organizational features.

BENEFITS

- Increased productivity for a competitive edge
- Improved client service
- Helps achieve strategic business goals

Standardized Procedures

Boyne Clarke staff knew that one of the keys to successfully integrating ProLaw was developing firm-wide and practice area-specific protocols. Everything—from how to open a new matter, to how to create document templates, to how to organize a file—was determined during the implementation process. This investment of upfront time not only standardized internal procedures, but also convinced practice leaders to adopt ProLaw capabilities into their workflow.

“ProLaw allows us to thoroughly leverage the customization capabilities to streamline daily tasks,” says Sarah Oursin, Staff Trainer and Document Coordinator. To date, 51 different ProLaw “tabs” have been created, each tab containing fields that can be merged to create specific documents. For instance, the Court Documents tab is used in 29 areas of law and contains relevant fields required for completion of pleadings and court documentation. Because each tab is searchable, locating files with limited information is very easy.

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Sarah Oursin
Staff Trainer and Document Coordinator

Convenient Web links created in tabs allow one-click access to online information. For example, direct links to commonly-used banks are available for staff to access current mortgage documents. Staff never has to spend time searching online to double check form updates. Updated online forms are then added to ProLaw as templates. “The tabs, which are very flexible and easy to design, definitely reduce the steps involved to create documents,” says Oursin.

Prior to ProLaw implementation, Short says he spent a great deal of time locating documents in their old system. “I spent several hours per week chasing down documents that staff misplaced because they forgot what they named them or where they were saved,” he says. In ProLaw, all documents are tagged to a specific matter in a central location and can be either located by their document number (automatically located in the footer) or with keywords. In addition, the automatic versioning provides an intuitive electronic paper trail. When searching on a document number, all succeeding versions are also displayed.

“Now I rarely get asked to help find a lost document. The hours I save give me the opportunity to handle more strategic IT issues for the firm,” says Short.

Enhanced Time Management

To ensure the timely processing of documents, ProLaw’s rules-based docketing system was configured to coincide with its document assembly. When needed, dates are tied to document templates to efficiently complete the task before the deadline. For a property transaction as example, the docket automatically configures the necessary events and tags the related forms. ProLaw also integrates with their email and calendaring system so all events and tasks scheduled in ProLaw automatically appear in their desktop. Escalating reminders have been set, so more people receive them as the due dates grow closer.

“Deadlines are simply not missed with ProLaw. Even when someone is out of town, all dockets and reminders can be easily reassigned to another lawyer,” said Oursin.

The firm has also creatively adapted the docketing process to handle internal purchase orders. When IT equipment is ordered, a matter is opened that includes the PO number, description of the purchase, payment terms, and so forth. Accounts payable can easily look up the details, check when it was received and mark it complete.

Staff is not only more productive with ProLaw tools at their disposal, but they are able to capture more of their time with built-in timers, custom abbreviations, spell check and simplified task-based billing. “Lawyers have commented that they believe they capture 15–20% more of their billable time,” shares Norris.

ProLaw clearly saves time and enables Boyne Clarke staff to be more efficient and productive. “Even if ProLaw enables lawyers to capture just 15 more minutes each day, it doesn’t take long to justify the investment. I would conclude that ProLaw paid for itself within the first year,” adds Short.

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Reporting and Queries

ProLaw's reporting and query tools have benefited the firm in a variety of ways. Norris is particularly impressed with ProLaw's ability to report on just about any detail on a macro or micro level. "If the firm wants to know how much we billed in the area of family law for a certain period of time, I can generate a simple report in a matter of minutes. I never have to ask IT to help me write an ad-hoc report," she states.

Once a year, the firm has a "Clean Up Day," when a half day is dedicated to cleaning up work spaces, both physical and electronic. Norris runs a query on files with no activities recorded in the past six months, along with the lawyers tagged to those files. This list is sent to the responsible staff to close down inactive files.

MORE TIME PRACTICING LAW

With ProLaw in place, Boyne Clark leaders are confident that they are providing stellar client service. Short has observed that lawyers now spend more time practicing law. "Because our staff knows ProLaw so well, they have more time to act as legal advisors rather than managing administrative staff for tactical procedures." As a result, client response time has improved and all deadlines are met.

In fact, the firm's Accounting Department includes a survey in every invoice to rate client's satisfaction. It is rare for a client questionnaire to come back where the firm and/or lawyer has not been rated at least very good or excellent across the board.

"We were initially looking to upgrade our accounting solution; however with ProLaw we also gained document management and assembly, case management, docketing and business development," declares Short. "That list continues to grow as we further leverage the power built into ProLaw."

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