

# PROLAW CASE STUDY CASE & ROBERTS P.C.

PROLAW INCREASES PRODUCTIVITY AND  
ENHANCES CLIENT SERVICE



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### ENHANCED SYSTEM NEEDED TO SUPPORT VALUE PROPOSITION

Case & Roberts P.C. has a very clear value proposition: Provide excellent legal services in a very cost-effective way, especially in civil litigation defense cases. "We want to give our clients the opportunity to have their cases heard and the chance to fight," says John Travers, Business Manager and the "go-to" person for anything administrative.

With 20 employees and two offices located in Kansas City and St. Louis, the firm's experienced trial attorneys are focused on the prosecution and defense of civil cases in state and federal courts. A few years after the firm was established, Travers led the effort to define the firm's requirements for an updated technology platform. Among the top features was a comprehensive case management solution that integrated with billing and other key firm applications like Microsoft® Outlook®.

"The legal industry is dogged with complaints from clients about the slow speed and lack of communication from attorneys. Not only did we want a solution to strategically meet our needs in the future, but also to help us respond to clients' needs as accurately and quickly as possible—and help change the negative perception of law firms," says Travers.

*ProLaw was the best solution that could support all of our internal goals and enable the team to provide better client service. In fact, ProLaw offered features that exceeded our expectations and allowed room for growth."*

John Travers  
Business Manager

After a methodical evaluation period that included reviewing "pages of other vendors," ProLaw® emerged as the leading solution that mapped to all of the firm's requirements. The stability of Thomson Reuters, the ProLaw integration with Westlaw®, and strong client references all helped tip the scales in favor of ProLaw.

"ProLaw was the best solution that could support all of our internal goals and enable the team to provide better client service," adds Travers. "In fact, ProLaw offered features that exceeded our expectations and allowed room for growth." ProLaw has proven to support aggressive growth at Case & Roberts, which has nearly tripled its size in three years.

Travers was also impressed with ProLaw's robust Alliance Program that provides built-in integration with many leading legal applications, including EquiTrac, the firm's cost recovery program. Because ProLaw is considered the firm's core application, Travers and the team select software that is compatible with ProLaw or that helps them capitalize on the existing investment.

ProLaw implementation and training was as thorough and methodical as the evaluation. With the "training the trainer" approach, the staff participated in a three-day new-user training class combined with online pre-recorded classes before they could start using the system. The team was able to perform basic functions within two weeks, and within six months, they were using ProLaw for all major functions, such as billing, case management and docketing.

"ProLaw is an excellent tool, but firms need to commit the right resources to tailor, implement, train and support the system in order to gain the most benefit," says Travers.

### PROLAW + POLICY = STANDARDIZED CASE MANAGEMENT

#### Document Production and Management

One of the firm's main goals was to develop a more streamlined case management process. With the old system, the staff was spending an inordinate amount of time drafting, proofing and formatting documents.

### CASE & ROBERTS P.C.

Case & Roberts is a litigation firm comprised of seven experienced trial lawyers who prosecute and defend civil cases in state and federal courts throughout Kansas and Missouri.

### STRATEGIC GOALS

To respond quickly and cost effectively to client needs with an integrated case management and billing solution.

### 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

- Enhanced work product and speed of client communication
- Ability to meet unique client billing requirements
- Increased productivity through high level of accountability

*“ProLaw has increased our response time through its central repository for all case information.”*

**John Travers**

Through ProLaw’s Document Assembly tools, the firm developed a valuable repository of document forms and templates that simplified the production of documents. The staff even generates envelope labels through this process. Because Document Assembly is integrated with ProLaw’s document management system, all files are located in one central place making it easy to locate any document.

“ProLaw pushed us to conceptualize document production and organization. With a sophisticated system in place, we were able to develop specific policies that determined the steps required to develop and store documents. Now, every document is started in ProLaw, assigned a document number and stored with the relevant matter number,” explains Travers.

ProLaw also helped the firm develop a consistent language used throughout its case management system. All document types and docket items have been defined and docket codes have been created to give an informative at-a-glance view of the firm calendar, such as HRG for hearings and DLN for deadlines.

Even though ProLaw enabled the staff to streamline document production, they did not have to sacrifice flexibility as a result. For example, users can easily create docket types and forms for particular clients, which is common with insurance firms.

#### **Docketing**

Prior to ProLaw, dockets were managed completely in Outlook through meeting invites—a very manual process. Now, armed with docketing codes, staff members input all docket items into a matter and assign them to the appropriate attorneys—all within ProLaw. These docket events are also pushed to their Outlook calendars and synched with a firm-wide calendar. For better visibility into workloads, Travers set up filters based on docket codes and users to get an accurate and quick firm view on who is responsible for each event in any given time period.

The firm’s intelligent use of the ProLaw Dockets also allows Travers to easily track docket types. He can generate reports based on the completion fields, ensuring no deadlines are missed.

“ProLaw has so much functionality. It enables us to produce very professional work product to serve clients well, in addition to adhering to court requirements,” adds Travers.

#### **SPEED OF COMMUNICATION**

Case & Roberts’ clients are the biggest beneficiaries of the firm’s standardization. “ProLaw has increased our response time through its central repository for all case information. When a client calls about a case, any staff member can look up the matter number and understand its status and history. Having data at our fingertips, versus managing paper files, makes a huge impact on client communications,” says Travers.

Travers also takes advantage of ProLaw’s remote access capabilities through the Outlook Exchange server. Attorneys and key staff are equipped with iPhones® for access to email, contacts and docket events while away from the office.

#### **UNIQUE BILLING REQUIREMENTS**

“Our clients, especially insurance companies, are very sophisticated purchasers of legal services,” says Travers. “It is imperative that we can easily provide very specific and very granular insights into their cases.” Billing is clearly an area that can provide a custom view into their financial status. With 90% of its clients requiring e-invoicing, ProLaw enables the staff to tailor each e-bill according to client requirements, which is a significant enhancement from their prior system that only allowed a single format.

Firm management is also experiencing increased requests for alternative billing arrangements, such as for fixed fees, combined fixed fees, tiers of billing, and capped fees. “ProLaw gives us the flexibility to classify matters based on client arrangements and track when we hit predefined thresholds. With this visibility into matter-level profitability, we are able to analyze and track a broad range of billing requirements. We couldn’t easily do this with any other tool,” explains Travers.

## DEMONSTRATED PRODUCTIVITY

Travers generates several key performance indicator reports throughout the course of the month. He loves the “brilliance of queries” to drill down and analyze raw data for a more meaningful view of the numbers. And because of the inherent transparency of matter management, ProLaw promotes a high level of accountability. Staff has the ability to self-monitor their progress and management can identify any potential issues before they become problems.

“There’s no question that we’ve increased productivity with ProLaw,” says Travers. “We are simply able to be more productive with less staff.”

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

