

PROLAW CASE STUDY JACKSON WHITE P.C.

KEEPING A COMPETITIVE EDGE WITH PROLAW VERSION 11



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JACKSON WHITE P.C.

CONFIDENCE IN INNOVATIVE TECHNOLOGY

Jackson White is one of the largest law firms in the Phoenix area's East Valley, with more than 60 employees offering a full range of legal services. Founded in 1983, the firm is proud of its ability to offer the efficiency and technical expertise of larger firms and provide the personalized attention of a smaller firm.

Over the past 23 years, Jackson White has judiciously utilized technology to gain a competitive edge. Brad Weech, a Managing Partner, explains some of the firm's calculated risks when they invest in new technology. "We want to push the leading edge without taking unnecessary risks. We implement technology that gives our employees the confidence they need to do their jobs better," said Weech.

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Brad Weech
a Managing Partner

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In 1999, the firm became confident that ProLaw® was the right solution for the firm. ProLaw delivers comprehensive practice and financial management capabilities in a single solution. Designed to match the way attorneys and legal offices actually work, ProLaw streamlines administrative tasks and allows staff to manage all matter-related items.

"When we evaluated different software solutions, we ideally wanted to have an integrated platform for front and back office functionality. We didn't want to take the risk of implementing a piecemeal solution, and we didn't want to pay for large firm features that we didn't need," said Weech.

Already a satisfied ProLaw customer, Weech and the firm's technology committee were eager to implement ProLaw V.11 when it was released in September 2005. Version 11 easily met the firm's need for enhanced accessibility of all matter-related information and assistance in creating documents and other legal products. "Our staff needs all information at their fingertips, and Version 11 makes that happen," said Weech. Also, the firm's use of V.11 features increased substantially following training they received at the annual Elite® User Conference.

UNIQUE APPROACH TO TECHNOLOGY ADOPTION

Jackson White's approach to new technology follows the classic product adoption curve where early adopters influence the majority of users to try new products. Over the course of its history, Jackson White has learned that technology adoption is more successful when the staff develops its own desire to use it, rather than it being dictated from the top down. The firm refers to its early adopters as the "Bump and Bruise Crew."

The early adopter group is made up of staff members who are interested in introducing new products to the firm. They undergo the necessary due diligence before recommending new technology. Once the product has been approved and implemented, adoption takes its natural course. If it is truly a benefit, more and more employees will integrate the application into their daily routines.

In the case of ProLaw, the group had the opportunity to look at Version 11 before it was released. Cleaner Outlook integration, an upgraded user interface and enhanced reporting features made the decision to upgrade a "no brainer." Soon after implementation, the staff embraced the new features that truly made them more efficient and better able to serve their clients.

IN BRIEF

JACKSON WHITE P.C.

Jackson White is a full-service law firm with an emphasis on commercial litigation and elder law. Headquartered in Mesa, AZ, the firm has more than 60 employees across four offices.

FOCUS

Remain a leader in the legal community by taking advantage of the latest technology solutions to improve firm-wide efficiencies and provide quality services at a competitive price.

BENEFITS OF PROLAW V.11

- Enhanced client communication
- Improved access to more information from a central location
- Increased firm-wide efficiencies with automated workflow

FAVORITE FEATURES

Practice Management

One of the most common complaints clients voice about law firms is a lack of regular communication with their attorneys. Jackson White views ProLaw as a tool to bridge this communication gap. Having easy access to all information relating to a matter in electronic form enables attorneys to keep their clients up to date on every step of their case.

Pro Filing: Integration with Outlook and Word

Version 11's bi-directional integration with Microsoft® Word and Microsoft® Outlook saves the firm valuable time. From either application, staff can easily save emails or documents directly to the related matter in ProLaw with the click of a button. Furthermore, all contacts entered in ProLaw automatically appear in Outlook's address book and are linked with the pertinent matter. "This allows me to add or change a contact just once in ProLaw and it populates the information everywhere – including email, Outlook contacts and even my cell phone. With our voice recognition interface, I can leave the office and tell my cell phone to call the contact I just added. In addition, the information is also included in our marketing and financial databases," said Weech. "The time savings and consistent data is a huge benefit for us."

Paperless Files in One Central Location

The big push for a paperless office was driven by the staff. "We were simply spending too much time going through physical files to find the fax or letter we were looking for," said Kelly Black, Senior Associate attorney and member of the technology committee. With built-in support for document imaging, emails, faxes, letters, notes, events, documents and phone calls are now accessible through ProLaw. Jackson White even keeps original voicemail messages in ProLaw and can email them to clients so they can hear the message, including the sender's voice, rather than the more expensive and sometimes less informative attorney restatement of what was said.

"There are significant benefits to having everything in one place. Being more organized cuts down on administrative time and allows us to respond more quickly to clients," said Black. "Since we started using ProLaw, I rarely have to tell clients that I will call them back with the information they requested."

Time-Saving Custom Tabs

Another example of improved organization is the custom tab the firm developed to organize case information and to quickly view online court dockets. With just one click of the mouse, ProLaw opens a Web browser and automatically inserts the case number into the Superior Court's Web site. Attorneys can instantly view the status of the case, which is particularly beneficial when the client is on the phone. Previously, they would have to go through several steps and online screens to access the same information.

Convenient Westlaw Integration

Jackson White staff can also access Westlaw, the leading online legal research service, without leaving the ProLaw desktop. For example, attorneys can access Westlaw with a click of their mouse to conduct research – all within the context of the matter they are working on in ProLaw. In addition, ProLaw is integrated with Westlaw QuickView+, allowing all research fees to be automatically captured and charged back to a specific client.

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Kelly Black
Senior Associate

Financial Management

Client Accounting Manager Tina Sigrist cannot imagine doing her job without ProLaw. She has always benefited from ProLaw's automation and flexibility for the routine and more specialized accounting functions she performs every day. Version 11 provides upgraded reporting and billing capabilities with a new interface. "The new look and feel of the screens is more professional and I like the expanded options on the drop-down menus," said Sigrist.

Automating Procedures

The first thing Sigrist does each morning is open ProLaw to see what new client matters need to be set up. This information is automatically routed to her via a customized form in ProLaw. She then generates a billing file where she keeps track of all client notes, such as special billing arrangements. This process allows her to keep all client and matter billing information in one place, which is valuable when generating monthly invoices.

ProLaw enables Sigrist to run all of the firm's monthly pre-bills in about four hours, which is significant considering she runs about 1,100 each month. "On the first business day of the month I am able to get pre-bills into the hands of billing attorneys by one o'clock," said Sigrist. "The faster we are able to get our invoices out, the faster we are able to collect revenue. This obviously has a positive impact on our cash flow."

Easy Reporting

The cash flow report is just one of the morning reports that Sigrist generates for shareholders. She also includes account balances and time reports, which are easy to generate in minutes due to ProLaw's built-in report writer. It provides default reports, as well as the ability to design customized reports by dragging and dropping specific fields.

Sigrist takes advantage of the Inquiry tab that allows her to easily locate financial details pertaining to clients in seconds. She frequently gets calls from clients asking for information regarding the status of their account, such as: "What is the current balance?" "What has been billed to date?" "What are the current fees?" Sigrist has access to this information with just a few clicks. She is also able to send the client a screen shot of the data.

Advanced Billing Features

ProLaw offers the ability to apply an unapplied balance to another matter without cutting a check, which was required previously. Clients who have several different matter invoices may overpay on one invoice and still have a balance on another. Before ProLaw, Sigrist had to issue a payment back to the client. Sigrist can now eliminate the hassle of cutting extra checks by simply posting the overpayment to another outstanding invoice.

Due to the breadth of their law practice, Sigrist also manages contingency case settlements. ProLaw offers advanced features for contingency cases, such as being able to analyze proposed settlement scenarios and receive an instant calculation of both the client and the firm's net proceeds. Once the contingency settlement has run through the financial system, it automatically prints out a report that is provided to the attorneys. "It is very helpful for attorneys to review the figures. They are better able to analyze the case," said Sigrist.

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Brad Weech
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BOTTOM-LINE BENEFITS

Brad Weech does not hesitate to list the overall benefits Jackson White receives from ProLaw. "Our clients are better informed, attorneys and staff have more information available to them and ProLaw's automated features allow everyone to work more efficiently," said Weech.

Weech also credits ProLaw with allowing them to retain a smaller staff for their attorneys. The firm is able to maintain a ratio of one legal assistant to every two timekeepers, which is low compared to other mid-size firms.

When it comes to how the firm measures ProLaw's return on investment (ROI), firm management does not feel it is necessary to measure ROI dollar amounts. "The cost benefit ratio of having ProLaw in our firm versus not having it at all is certainly in our favor," said Weech.

UNLEASHING THE POTENTIAL OF PROLAW

Jackson White's administrative and IT departments are constantly mastering advanced features within ProLaw that increase access to information. One project currently underway is getting the ProLaw Portal up and running, which allows staff to easily manage case activities from any location with an Internet connection. Attorneys with appropriate security access can retrieve the same ProLaw information online as they can from their desktops. In fact, firm attorneys have been experimenting with going to court with only a laptop configured with high-speed wireless Internet access. By logging into the ProLaw Portal, they now have access to the entire ProLaw matter file, which provides ultimate convenience and absolute preparedness.

Jackson White also leverages the resources available at the Thomson Elite Annual User Conference where they attend ProLaw-specific tutorial sessions. "We love going to the conferences because we really learn from seeing how other firms use ProLaw. We always find a better way of doing things for front and back office processes," said Sigrist.

Put the power of ProLaw V.11 to work in your firm today. Learn more by visiting www.prolaw.elite.com or call (800) 977-6529 to schedule a demo.