

**PROLAW CASE STUDY**  
ERIE COUNTY  
DEPARTMENT OF LAW

RUNNING COUNTY GOVERNMENT LIKE A BUSINESS WITH PROLAW



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# ERIE COUNTY DEPARTMENT OF LAW

## RUNNING COUNTY GOVERNMENT LIKE A BUSINESS WITH PROLAW

### ACCOMPLISHING MORE WITH LESS

The Erie County Department of Law in Buffalo, New York has experienced similar fallout as the public sector during the economic downturn: the workload has increased while staff numbers have decreased.

In response, County Executive Chris Collins has adopted Lean Six Sigma, a proven business methodology to increase efficiency and eliminate waste, and his mantra is "running county government like a business." Because of these heightened expectations, departments across the board are reviewing internal processes and technology platforms to determine where efficiency gains can be made.

To tackle these challenges, Kristin Klein Wheaton, First Assistant Attorney in the Erie County Attorney Department of Law, is constantly looking for better ways to streamline processes and increase efficiency at an individual and department level.

The Erie County Department of Law handles litigation and family court divisions with 16 lawyers and 25 total staff members. County Attorney Cheryl A. Green and Wheaton are also responsible for managing the County's Risk Retention Fund, which is created and funded by the legislature to pay any claims against the county and requires a biannual audit.

The department had been using a combination of case management and Quicken® applications to handle all litigation and transactional matters, manage outside counsel and expenses, and report to other departments.

While the previous case management application allowed the generation of some basic reports, it lacked the more advanced features. "I recognized the deficiencies in our technology platforms and knew there had to be a better way," says Wheaton.

Wheaton and her team were focused on three main objectives for a technology investment: to have consistency in the department's standards and workflow processes, to be able

to eliminate manual steps in creating reports, and to be able to easily customize the application without any additional outside investment.

When they saw a demo of ProLaw®, they realized the integrated solution met all of their requirements and more. The ProLaw software suite is designed to help government agencies automate the practice and manage the business of law through a unified database that combines case and matter management as well as time entry, billing and accounting capabilities.

Wheaton and her team evaluated other solutions, but none offered the fully integrated solution in a single platform like ProLaw. Even selling ProLaw to the county's IT department was not a major challenge once they saw all the features within the solution. They agreed that one system was a significantly better option than having disparate applications that might need additional resources in order to work together.

The implementation of ProLaw was also planned to be as efficient as possible. The department embarked on an aggressive schedule and felt the support team was "absolutely fabulous" with keeping the project on track, communicating progress and providing comprehensive training and support.

### TIMESAVING FEATURES

#### Unified Case Management

With ProLaw, case management is a much more fluid and integrated process. Previously, the department had no set policy regarding their electronic filing system. Besides their own personal computer storage, each user had access to the public server and consequently users organized their files based on preference and habit. "If three people worked on the same file, there was a good chance that there would be three versions of that file saved on their personal drive," shares Wheaton.

### ERIE COUNTY DEPARTMENT OF LAW

Based in Buffalo, NY, the department provides legal services for the county, its officers and administrative units. The 16-attorney department handles both litigation claims against the county and transactional matters for the county, as well as family court matters.

### STRATEGIC GOALS

To increase efficiency with more consistent and streamlined processes to conduct business.

### WHY PROLAW?

ProLaw provides features geared for government legal agencies to more efficiently manage their workflow.

### RESULTS

- More efficient case management workflow
- Centralized database eliminates duplication of effort
- Automated reporting capabilities provides better management of resources

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**Kristin Klein Wheaton**  
First Assistant County Attorney

This unstructured organization also made finding and retrieving files a time-consuming task. With the previous system, users often waited long periods for results for even basic file names. Or users would resort to the Microsoft® Windows® search function based on any keywords, which brought up numerous files to weed through.

ProLaw has enhanced the department’s case and document management with a centralized repository for all files that are associated with the appropriate matter number. Now users create, edit and save all documents within ProLaw. Files can be easily retrieved on a range of known variables, such as matter number or contact information.

The extensive integration with Microsoft Outlook® enables attorneys to drag and drop all email attachments directly into the matter, where it can be stored within the Events tab. “My Inbox is constantly overloaded, so I love dragging an email into ProLaw and have it automatically deleted from Outlook. It is a very efficient way of managing my email,” explains Wheaton.

The department also takes advantage of automatic document generation based on more than 50 templates—including faxes, letters, pleadings and petitions—that have been set up in ProLaw. The appropriate fields are automatically populated based on data contained in ProLaw.

The ProLaw integration with Adobe® is a major feature for Wheaton and her team, particularly because of the nationwide mandate in Federal District Courts that requires all electronic files be submitted as PDFs. ProLaw enables users to select and convert documents to PDF, rename the file, and save it to an external locale in a single step. In addition, the department sends all email attachments as PDFs, which eliminates the need to print and maintain physical files.

#### **Easy Options for Timekeeping**

With the implementation of ProLaw, all users are now required to keep track of their time, which has given Wheaton greater visibility into staff productivity. To make time entry easier, ProLaw provides many opportunities for staff to enter billable time from throughout the system so it can be automatically captured without disrupting workflow.

Wheaton is required to annually report on how her staff’s time is divided among the departments. In the past, this has simply been an arbitrary guess. Even though the department has not completed a full year of tracking time in ProLaw, the analysis is enlightening.

“I conducted a demo of ProLaw for the county’s Technology Steering Committee. I was able to generate a time report that gave a summary listing for each department broken down by hours. They were impressed with the level of detail I could produce in just seconds on my laptop,” says Wheaton. “Plus the transparency of the data allows us to make necessary adjustments to prioritize our time, especially as our staff contracts.” This reporting ability is particularly important as the county moves towards performance-based budgeting.

Another positive effect of timekeeping has been a more streamlined billing process. The department invoices a handful of departments and cuts expense checks, so Office Manager Linda Juliano-Jack is able reconcile her account in ProLaw. Whereas before her invoices were sent as manually generated spreadsheets attached to letters, she can now easily pull time reports and generate professional bills for inter-department invoices. “The best part is that all data is entered only once in one location,” adds Juliano-Jack.

#### **Automated Reporting**

Wheaton truly values the custom tabs in ProLaw that help her manage and analyze the Risk Retention Fund. Her predecessor had been keeping track of activity for each claim on a spreadsheet that was not integrated with their existing case management platform. Updating the spreadsheet for the biannual review required supplemental staff support and would take hours. Moreover, the data was prone to human error that led to inaccuracies in the final report.

“The old process took a ridiculous amount of time and I knew it had to be automated,” says Wheaton. “ProLaw’s reporting capabilities allow me to run a report at my fingertips with no manual spreadsheets.” She can generate a report at any time—not just for the biannual audit report. Additionally, she never has to question the accuracy of the information.

### BLACK BELT IN BENEFITS

In a short time period, the Erie County Department of Law has streamlined processes that create a more efficient way to do business. "ProLaw has been an invaluable tool to reduce the number of steps associated with many tasks in our office. Every minute saved can really add up in one day," Wheaton says. And they are just getting started on realizing the benefits of all the features in ProLaw.

ProLaw has also gained attention from the county's Sig Sigma Black Belt leaders, who recognized the law department's improvements in processing and reporting capabilities. They are now looking to expand ProLaw into other departments, moving closer to the county's goal of running the county government like a business.

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