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## Getting a Grip on Case Management

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Stark & Stark is a 102-attorney firm based in Lawrenceville, N.J., with satellite offices in New York City, Marlton, N.J., and Philadelphia. We offer a wide range of legal services for both businesses and individuals.

For many years, we considered installing a case management product for the business and commercial/corporate litigation portions of our practice, but there was insufficient attorney interest to make it happen.

### THREE-YEAR EFFORT

In the summer of 2003, we began a three-year effort to incorporate a case management system into our firm. Our technology committee included co-managing shareholder Lewis Pepperman, shareholder Kevin Hart, applications specialists Amy Hamilton and Susan Salzano, senior network administrator Bill Tipton and myself (I'm the firm administrator).

We were using several different technology products, including LexisNexis HotDocs document assembly, Advanced Productivity Software Inc.'s DTE time capture program, Novell Inc.'s GroupWise e-mail and Summation litigation software (now CT Summation).

We had invested significant time and money in these products, especially HotDocs, so we needed to find case management software that would integrate with all of them and be flexible to accommodate our growing firm and diverse practice areas.

We also wanted a program that would provide greater efficiency and organization, permitting access to all case information in one central spot.

### FINALISTS

Over the course of a few months in the fall of 2003, we looked at many products. Our personal injury group had used Needles case management, from Chesapeake Interlink Ltd., for years, but at the time it did not integrate with HotDocs.

Our three finalist vendors were Client Profiles Inc., Legal Files Software Inc. and Synaptec Software Inc., which makes LawBase. All offered products that were scalable and had strong database engines.

Integration capability was the main deciding factor for us. Client Profiles didn't integrate with HotDocs or GroupWise.

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Legal Files had HotDocs integration, but we never saw a demonstration of it and were unsure if it would work with the version of HotDocs we were running.

After about four months of internal discussion, testing and negotiations, we purchased 20 licenses of LawBase at the end of 2003, for \$20,000.

LawBase is a case management product that runs on an SQL back end. The product was flexible and we felt it would be a good long-term choice.

The database is adaptable and can handle complex data, such as audio and graphic files, as well as standard contact and case information. LawBase SmartFolders help users automatically group files and matters, and track cases by attorney, subject or other information. The product offers contact management and calendaring, and integrates with other legal software on the market, including time and billing, document management, document assembly and litigation programs.

Recently, Synaptec has developed tie-ins between LawBase internet-based technology such as GoogleMaps and Yahoo Maps.

LawBase already integrated with HotDocs, GroupWise and Summation and their technical team said they could build an interface with DTE.

In December, 2003, Amy Hamilton began work with LawBase technicians on design. For several months, the team worked to customize the screens. Design complications occurred because some of our PCs were using Windows 98, while others had been upgraded to XP. This necessitated adding memory and replacing machines in order to get appropriate processing speed.

Our biggest issues came up with the integrations. LawBase set up integrations with GroupWise, HotDocs and Summation with little problem.

However, the LawBase to DTE integration had to be built from scratch. LawBase created a special interface that allowed users to mark Note entries as "billable" and transfer that information directly to DTE, eliminating the need for double data entry.

## **ROLLOUT**

We rolled out LawBase in May 2004. Our LawBase services bill came to about \$13,000 for five months of consulting services and training. In terms of data import, our group did the "heavy lifting" behind the scenes prior to the rollout. We populated LawBase with as much data as possible before the users saw the product, extracting major data sets from our accounting system and Excel spreadsheets such as client/matter numbers, names and addresses, important dates and certain billing details. Users could start using the system right away without re-keying all of their data.

Our construction litigation unit, led by shareholder Donald Brenner, was first to use LawBase. We called them our "worst case scenario" group, not because they were negative or difficult, but because they had the most complex needs for the system. With 11 users, they had large volumes of data due to their many-phased litigations and needed to track people, due dates, timelines, workflow and tasks. They also had motions, depositions and discovery items to organize and needed to link to the data in Summation. Several workflow customizations were put in place to facilitate the group's work.

## **SIX MONTHS**

Our team worked an additional six months to get GroupWise and DTE straight and make other changes to the design in terms of workflow.

The centralized data was a big plus. The construction litigation team benefited from consolidation of calendars, which enabled them to link from within the cases. For example, all parties involved in a case were located on one LawBase tab, which offers easy reference of names, roles and contact information.

We eventually expanded LawBase into other departments. Today, we have 45 licenses, and have added more workgroups, including our residential real estate, securities regulation, business litigation, criminal and mediation groups.

## **ADDITIONAL HELP**

In November, 2006, we faced our most recent challenge. LawBase has a unique bi-directional interface to HotDocs that allows for the HotDocs template to add information to the LawBase database. For example, a form letter can automatically create its own activity note and ticklers.

We have many forms that are very complex, and we needed additional help to get the project completed. So Synaptec connected us with Capstone Practice Systems, based in Harvard, Mass. The consultancy specializes in Hot Docs, and was able to create templates that enhanced our LawBase tools. Capstone's customization services have cost us \$5,000 to date.

## **UPGRADE**

In February 2007, we upgraded to LawBase HD (free with our maintenance plan). The main benefit of this upgrade is that LawBase now identifies all instances within the system where a particular person or entity is linked.

We also liked HD's link to Yahoo Maps, called the LawBase/Yahoo Maps Mashup. By extracting data from LawBase, our users can plot multiple points on a Yahoo Map to help them track geographic groupings of data.

Synaptec continues to work with us to resolve any open issues in a timely manner. For example, we are working to correct some duplicate entry issues with our LawBase/HotDocs answer files. We plan to establish access to HotDocs through LawBase, which will eliminate the need for users to maintain HotDocs answer files.

Looking forward, we expect to upgrade to GroupWise 7 this year, and our marketing department intends to use LawBase as a modified client relationship management system to manage client development efforts. Our plan is to eventually roll out LawBase to 75 more users by 2009.

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