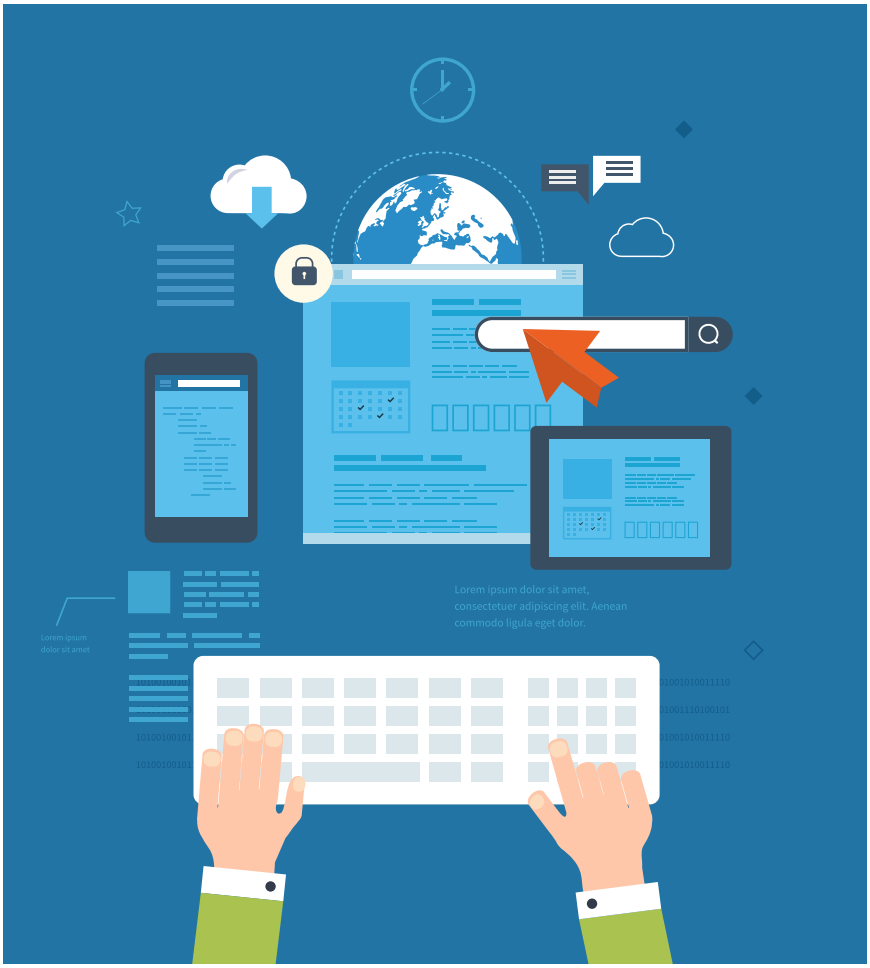
Plug and Play and Succeed: Integrated Adaptive Legal Matter Management



by Steve Stockstill

Historic Overview

If you have been in the legal industry long enough, you might remember early efforts to develop "all-in-one" software applications. WordPerfect Office 2.0, introduced in 1988, included several integrated features in a single application. Those of us who worked with MS-DOS before then well remember the limitation of using one application at a time, making the appeal of an all-in-one solution quite attractive, especially in terms of productivity. Multiple business functions in a single application reduced the need to exit and launch another application to take a note, check a schedule or track time.

As Microsoft Windows introduced the concept of multiple applications running concurrently, functional capabilities of applications became more discrete. Software designers could concentrate on a narrower set of functionalities, resulting in significantly better applications.

This ushered in a new era of "best-of-breed" applications. With the fragmenting of application functionality came the need to share information among these applications. This requirement was not lost on software designers, particularly at Microsoft, where they were developing best-of-breed apps (Word, Excel, PowerPoint, etc.). These discrete applications needed to integrate in a way that was seamless and natural so the applications were "tightly integrated." Hence, the phrase "loosely coupled, tightly integrated" became a strategic design goal for software architects.

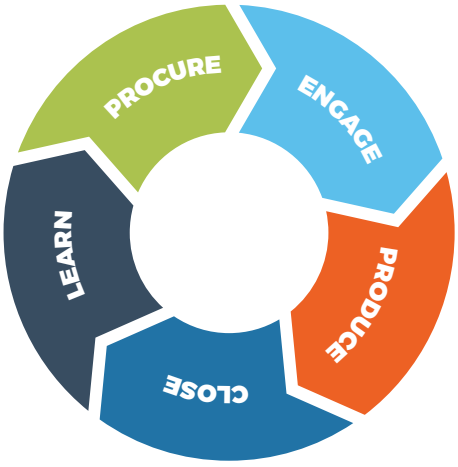
Modern Matter Management Software Architecture

The ability to integrate applications has been significantly enriched by universal network access. Modern applications not only communicate with each other on the same computer and local area networks, they also now can communicate across the internet in ways that combine functionality across an infinite number of resources. The site www.programmableweb.com lists several thousand web application programming interfaces (APIs) that vendors have provided for their products and services.

Workflow, productivity, mobility, extendibility and flexibility should all be cited when describing what properly integrated applications offer modern businesses. Don't fall victim to using technology designed around the limitations of legacy technology architectures.

Law firms and legal departments need a matter-based ecosystem that will allow their organization to achieve the highest level of efficiency for their clients. Often, their current business systems are inflexible and too structured or, sometimes, are not structured at all. Organizations need an end-to-end ecosystem capable

of supporting the entire life cycle of their business process, not discrete, fragmented or disconnected phases.



Procure, engage, produce, close and learn encapsulate the major elements of the matter management life cycle. Early stages of the life cycle can often be overlooked by focusing strictly on production requirements. For instance, technology solutions should allow access to other departments within corporations, while law firms need the capacity to drive new client engagements. Technology solutions should also be flexible in ways that accommodate process agility by adjusting to outcomes from previous learning experiences.

Adaptable Technology Is the Key

When an organization realizes the need for improvement, technology can make it happen. The appropriate software ecosystem allows organizations to apply the most successful business principles, while scaling to meet their future needs. Modern software technology can frame and automate processes in reusable ways. As unique circumstances arise, the best solutions will allow teams to remain agile, in context with their workflow. Efficiency relies on adaptation.

Consider these points for an adaptable matter management solution:

» An adaptable matter management application is the bedrock of your matter management life cycle. This application should provide a comprehensive yet flexible ecosystem to manage all aspects of an organization's work product. The matter management system should safely support legal matter and project management, while not isolating itself from meaningful integrations across the organization. This ecosystem will tightly thread information, automation, communication and all related business functions throughout the matter life cycle.

» Tightly integrated business process automation will significantly improve efficiency. Automation processes will allow staff to focus on their expertise rather than on redundant mechanical tasks. A good process design will ensure both accuracy and timeliness by eliminating human error. Adaptable automation processes encapsulate proven business strategies in a way that differentiates your organization from others.

» Team members need the ability to communicate and collaborate in context with key information (matters, documents, tasks, etc.) within the ecosystem. Attention should also be paid to the need to safely communicate relevant and timely information with customers and outside parties.

» Avoiding proprietary technology is a good step in ensuring that technology is adaptable and remains cohesive. Business requirements often cause organizations to customize and extend their system with support for integrating disparate information and other software applications. Unique processes set organizations apart and should not be an obstacle to success.

» Process templates can provide an excellent foundation for repeating success but should remain flexible. Strict processes are good for automation but can be obstacles to optimal efficiency. Staff should be allowed to manifest their human capital gained from training and experience. Predefined business processes should use automation where appropriate yet allow staff to adapt in areas where business conditions are likely to evolve.

Executing the Vision

Choosing the right software technology is the key to success. Most law firms and legal departments will benefit by combining the tenets of matter management

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with the efficiencies of project management. Decisions should go beyond the core requirements of matter management software. Those needs are easily met by most vendors in the marketplace. Extend the technology evaluation to include flexible project management capabilities that afford knowledge workers an opportunity to utilize their talents. Finally, solutions should have the capacity to extend from within, while also integrating with other applications.

Organizations should strategically select software based on how well it meets the needs of their unique business model. Applications will be selected based on how well they fit specific functional requirements (instead of using an "all-in-one" application). The goal of fragmenting functional requirements into new best-of-breed applications is to create natural productivity enhancements by using software specifically attuned to staff's functional responsibilities.

Execution of the vision can be done incrementally or all at once. Stay focused on core requirements; implement those first. Make initial adjustments sooner rather than later. Settle into a comfortable groove and continue to evaluate new and improved integration capabilities. Loosely coupling the technologies will allow organizations to plug and play applications with great ease.

Start with a Platform, Stay Loosely Coupled

Modern software is developed by combining independent applications built on top of commonly developed code. A good example is a Windows application. Within the Windows environment, Microsoft has already accommodated most of the infrastructure needed for an application designer's generic requirements. This allows the software architect the freedom to focus on the discrete business requirement of the end user. Fast-forward 20 years; with the advent of cloud computing, software architects now have a robust set of platforms to choose from.

Many legacy matter and practice management applications use the underlying Windows operating system as their platform. Modern development platforms allow software designers to start with business-level problems. The common, generic requirements should be satisfied by the platform. The most important aspect of the platform is the ability to seamlessly weave functional applications together in a way that suits individual needs better than an all-in-one app. Some platform vendors know how to do this well.

One of the most successful modern cloud-based development platforms is Salesforce.com. The Salesforce.com AppExchange was a precursor to the modern App Store made popular by Apple. Salesforce.com made its API very accessible, which richly rewarded customers with the ability to extend the Salesforce.com product to suit their needs. Salesforce.com's contact and calendar management, when combined with its enterprise workflow tools, provides an excellent foundation for modern application architecture.

Selecting Applications, Staying Tightly Integrated

Fragmenting functionality should not fragment practice data or affect workflow. Be careful by selecting applications designed to work well with other applications. Doing this will prevent workflow and data from becoming siloed by proprietary or obsolete technologies.

The make-or-break point in the process will be the ability to bring these functional best-of-breed apps into a cohesive group of related parts moving in unison. This is why selecting a platform based on its ability to weave applications within a unified framework is important.

Remember that the business processes within each division of labor will need solutions that best meet individual business needs. For instance, if an organizational unit touches more than a few dozen documents a day, ensure that attention is given to an industry-leading document management solution that accommodates current requirements but also projects continued growth for document storage and retrieval.

In addition to the many practical benefits of using independent, best-of-breed software applications, as opposed to all-in-ones, is the ability to spread your business liability across multiple software providers. This creates healthy competition among vendors and keeps business goals agile. Integrated solutions will ultimately lead to lower licensing costs by needing to procure licenses only for those users interfacing with the integrated functionality.

Plug and Play and Succeed

As your firm embraces the future, you likely are looking for new, innovative technology to manage and exceed client demands. Forward-thinking legal and IT professionals should ask themselves: "Are we embracing modern technology? What could our firm do if more of our disparate systems worked together?" The answers lie in the ability to plug and play with integrated, adaptive matter-centric management software. **P2P**

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