

Bringing a small firm into the 21st century.

By Adriana Linares

The Consultant:

Adriana Linares, president of LawTech Partners



The Firm:

The Law Office of Joseph Haynes Davis is a solo practice based in Orlando, Fla.

The Challenge:

Learn to comply with the Middle District of Florida's electronic bankruptcy filing mandate as well as implement an overall practice management system.

Tech Transformation

Working with small firms often can be a dream because I am working directly with the decision makers. There is almost no red tape, so things actually get accomplished. This certainly was the case when Joseph Haynes Davis approached me.

I met Davis in his Orlando, Fla.-based office in October 2004, and I liked him right away. He had a colorful personality and was not afraid to admit that he and his practice needed help. He knew before I even got there this was going to be a long-term relationship that would survive beyond his crisis – learning to comply with the Middle District of Florida's new electronic bankruptcy filing mandate. At our initial meeting, I mentioned future projects. He never flinched. Essentially, he said, "Bring it on, I need out of the Stone Age." That is exactly the kind of attitude a consultant dreams of.

Goals

From a consultant's perspective, I had a few goals. Davis had mentioned he felt more like a small business owner than an attorney. I wanted to use this as an opportunity to show him how technology could positively impact his business, and therefore leave him more time for practicing law.

My second goal was to leave Davis wanting to learn more. Technology constantly evolves, and to stay on top, Davis was going to have to evolve with it.

My third goal was to leave Davis with something he could operate. He doesn't have an Information Technology

staff to help him, so he needed a system that would allow him to be productive on his own.

I also wanted Davis to realize each piece of technology isn't an island, and build bridges across the various aspects of his business.

The Implementation

When Davis hired me, it was because he had to – certainly not because he wanted to. He was in a quandary about a bankruptcy case that had landed on his desk and required filing in a hurry. Normally this would not be ranked as an emergency, except for the electronic filing mandate. Davis had attended the obligatory four-hour attorney training session and forgotten it all by the time he unlocked his car door.

We began his transformation to the Electronic Age by reviewing bankruptcy software options. Davis only has a few bankruptcy cases a year, so we agreed not to blow his technology budget on a bankruptcy system. However, we realized that the work was there and might even grow one day. We decided to break even on the first bankruptcy case and use it as the technology guinea pig for learning and operating. We chose a simple, reasonably priced program from Puritas Springs Software (www.puritas-springs.com) for bankruptcy filings.

When I talk about this project as a guinea pig, I mean it. I never had worked with bankruptcy cases in this fashion. I told Davis immediately that I had no experience with this exact situation, but I did promise that with my knowledge

and experience, I could figure out what would work best for him.

There were two components to this project: the court's Electronic Case Files and the software from Puritas Springs. I began by reviewing the paperwork and information Davis had from the court, making some phone calls and eventually attending a training session myself. Once I had an understanding of what the courts required and how to use their system, I returned to Davis' office and we worked together in filing a practice case. We began with the software, which we both found to be simple yet thorough. The best part was, after about an hour of working with Davis, I knew I could leave him alone with the software. Once we had the documents ready to file, we hopped onto the ECF system and filed them within 20 minutes. Mission accomplished.

After we had the bankruptcy case settled and the technology to manage later cases in place, we moved on to another level of his digital transformation — practice management. To put it lightly, Davis' current methods needed improvement — Sticky Notes, coffee stained yellow pads and 4,126 e-mails in his Inbox.

We talked about what he wanted to accomplish, and when I mentioned a few things to consider, I saw a light bulb flash over his head. He grabbed a box containing Alumni Computer Group's PCLaw (www.pclaw.com) from a utility closet, blew the dust off it and said, "Do you mean we could use something like this?" Happily, I said "Yes."

I started by installing and configuring the software on his and his assistant's PCs. We started with basic training in a shared database, data input and general information retrieval. Davis had been keeping phone numbers, addresses and general information about each case in a paper file. Each time he needed to place a file-related call, he had to get up from his desk, locate the file and flip through sheets of paper before finding the number. PCLaw allowed him to have all that general information at his fingertips.

Once he felt comfortable with navigating PCLaw, we started with a basic function — time keeping. In implementing this solution we really began to move Davis in a new direction. He was amazed at how quickly and easily he was able to generate an accurate bill for his clients. He started to recognize the


importance of "date integrity" and "data management."

Between these two major projects, we snuck in some Microsoft Word and Outlook training, as well as training to configure and use the scanner and Adobe Acrobat to submit documents through the ECF system, to protect and distribute documents and to make a slow shift away from a traditional fax machine. Dedicating only 30 minutes from each of my visits to general training, question and answer sessions and troubleshooting made an impact on Davis' efficiency.

The Result

Today, my relationship with Davis continues to grow. He calls me often to question how a certain process might be made easier with technology. He called yesterday to have me come meet with him and "a lady from some real estate software program." Mercy, I have created a monster. **.loc**

Adriana Linares is the president of LawTech Partners (www.lawtechpartners.com), an Orlando, Fla.-based provider of consulting, training and software solutions tailored to the special technology needs of law offices. LawTech Partners works with solo practitioners and small law firms to redesign practices and implement solutions that promote innovation, performance improvement, increased efficiency and knowledge sharing.



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