

CREATING THE MATTER-CENTRED PRACTICE

New connected technology delivers on the promise
of joined-up legal management for the email age

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INFORMATION WORKERS, IN A 'KNOWING' ORGANISATION

Ask most lawyers what they do for a living and they will tell you that they 'practice law' or perhaps 'help solve problems for their clients'.

Both explanations are, of course, correct. But if we look at the role of the modern lawyer within today's business environment, it is also true to say that they are in the vanguard of the new category known as 'information workers' or 'knowledge workers'.

Lawyers, arguably more than any other professional or vocational group, spend their time gathering and analysing large quantities of information, and then using their acquired know-how to decide how best to process it. If we take this concept to its logical conclusion, a law firm is inherently a 'knowing organisation,' in the sense that without access to this information and knowledge a law firm effectively ceases to exist.

The ability to store, access and process this vast bank of knowledge has always been the lawyer's stock-in-trade. But in the modern era, lawyers, like all information workers, need to harness technology to manage and manipulate all this information more effectively and efficiently.

Although there is no shortage of information technology currently available to law firms, hitherto this has typically taken the form of discrete systems, each holding their own islands of information.

As a result, the material the information worker needs is all available digitally, but accessing it is hindered by the fact that it is spread across accounts and financial systems, office automation and word processing packages, client relationship management, document management and case management applications and – the biggest problem of all today – email systems.

Linking these diverse information sources together to create a truly joined-up legal practice is more than just an interesting technical project.

The pressures of running a modern law office are increasing. As well as the demands of clients and financial institutions, there is pressure to comply with legal and professional regulations such as Sarbanes Oxley and the Freedom of Information Act.

Firms are driven by the need for greater efficiency, productivity, profitability and commercial prowess. In the process, streamlining access to information for fee earners, practice managers, accounts department staff, secretaries and any other information workers within the firm is of paramount importance.

Yet the economics are unassailable. Add in the escalating problem of how to cope with the emergence of virtually ubiquitous email communication – a problem which is, arguably, of specific relevance to the legal profession who will ultimately have to deal with its consequences – and it's clear that creating a joined-up, matter-centred, knowledge-sharing organisation is the key challenge for legal technology today.

In this paper, we describe how the latest advances in integrated and connected technology are being used to provide the answer – a truly matter-centred practice for the 21st century.

THE MATTER-CENTRIC MODEL

From being a largely academic concept only discussed at conferences, over the past 18 months ‘matter-centricity’ has evolved into one of the hottest topics in legal technology today.

Cutting through the jargon, matter-centricity addresses the key problem: how to create the digital equivalent of the old paper file, where copies of all the documents, notes and correspondence relating to a particular case (or matter) were stored in one manila folder that anyone could pick up and immediately have the whole story at their fingertips.

“WITH THE FAMILIAR FILE STRUCTURE AND LINKS TO WORD AND OUTLOOK IT’S EASY TO FIND INFORMATION IN OMS MATTER CENTRE, WHICH IS A MASSIVE BENEFIT TO USERS FROM A TIME AND BILLING PERSPECTIVE. PEOPLE ARE MUCH MORE PRODUCTIVE.”

David Pearson, Chadwick Lawrence

There is no shortage of data generated by modern legal systems. The key is being able to expose all of the right information about a matter, when and where it is needed, to the relevant knowledge worker(s).

The design logic behind a matter-centric system is therefore simple – to pull all the relevant information together from different sources (including back-office financial and time recording systems, case management files and any third-party sources) and then output it in the appropriate form to lawyers, law firm staff and any other relevant parties – including clients.

In other words, the matter lies at the centre of a structured and, wherever possible, proactive flow of information, with automation being used to maximise productivity.

The OMS Matter Centre system from FWBS – recently described by the Society for Computers & Law as “coming about as close as any product does to providing a one-stop interface to every item of information connected with the management of a particular matter or client, (OMS Matter Centre) will be the next big thing in mid-to-large firm technology” – was the first commercially available product to deliver matter-centric computing to law firms.

Now, its ability to integrate intelligently with leading back-office practice management systems such as Aderant’s CMS.NET, and its truly comprehensive capability for matter-centric email management, have taken the matter-centric model to new levels.

For the first time, law firms have the ability to implement a wall-to-wall system; using ‘best-of-breed’ back-office, case management, office productivity and communication systems; based on standard technology platforms; delivered through familiar Microsoft applications (Microsoft® Outlook® and Microsoft Word), yet specifically designed to meet the needs of the legal profession.

“OMS MATTER CENTRE HAS COMPLETELY CHANGED OUR WAY OF WORKING, ENABLING US TO KEEP TRACK OF ALL OUR COMMUNICATIONS.”

Steve Turner, Gill Akaster

MEETING THE CHALLENGE OF E-COMMUNICATION

Managing email is now probably the foremost issue facing law firms today. With email communication now forming the backbone of human and commercial interaction, the management, storage, accessibility, security and integrity of 'virtual' documents is a necessity.

Already, three-quarters of all discovery requests in legal cases relate to email communications. In business, this is causing major concern – due to the potentially vast cost of retrieving critical e-documents from data facilities – and rapidly leading to the development of new storage architectures in an attempt to relieve the situation.

In the law, there are two challenges: not just to maintain rigorous control over email, but also to use email actively to gain major efficiencies in management and practice. Particularly as the information contained within email is such valuable intellectual property in law firms today.

Many large law firms are spending significant sums of money developing sophisticated answers to this problem; bespoke solutions designed from the ground up to cope with the managed filing and retrieval of email – many using antiquated portals that require the user to move across various tools to locate information.

Solving this problem in isolation meets only one of the two challenges. It is in harnessing e-communication, reliably, as part of a matter-centric approach to practice systems, that the real advantage is gained.

Matter-centricity demands a comprehensive, integrated approach – and provides the means to achieve it in the required context.

The matter-centric filing framework which enables a system like OMS Matter Centre to collate virtual matter files and serve them to whoever requires them, complete and up to the moment, also enables the system to bring email under control equally effectively.

The matter-centric model works in the context in which lawyers work: enabling each document,

spreadsheet or attachment to be profiled against a client and matter, for easy viewing via OMS Matter Centre running within the Microsoft Office suite. It is by giving information true context that matter-centricity becomes the basis for the most natural and efficient way for law firms to work.

The unique ability of Matter Centre Email from FWBS also overcomes the key issue facing all organisations now wrestling with the email management issue: what to do about the existing email mountain, lying all over the place in individual inboxes, desktop files, databases and storage repositories, and the constant inflow of matter-related emails which continually arrive, day after day.

Operating within the familiar Microsoft Outlook environment, Matter Centre Email features a unique 'file as you go' principle that enables lawyers to profile every new and existing email. Profiling enables the sharing of knowledge as these emails can then be sent to and viewed by any person with authorised access to the particular client and matter, via the matter-centric view. Incoming and outgoing email can also be filed with a single mouse-click and even tracked while they are outside the firm.

It is this principle that is the key. Instead of focussing on the ability to store and retrieve communications, the File As You Go model treats email as living data – part of the matter in hand, rather than simply an archived reference.

Thus, email can take its place, in law firms as elsewhere, as a reliable and easily accessible means of communicating, informing, transacting and/or contracting, without the constant fear of non-traceability or the need to run extensive post-analysis exercises to decide on degrees of relevance, retention periods etc.

Email congregates around the matter, rather than being exiled into the archive. It can be stored in a variety of locations, or against multiple matters.

MOVING FROM PROPRIETARY SYSTEMS TO THE OPEN PLATFORM

To date, almost all attempts to create a joined-up legal practice have been based on the proposition that ‘matter-centricity’ will need to be achieved by committing to specialist proprietary applications from a single source.

However, as no single software vendor can supply every system needed in the modern law office – from accounting to timekeeping, from research to correspondence – this means firms have had to waste time, resource and effort to create portals linking all their diverse systems together; with the additional problem that portals are often awkward and lacking in functionality, forcing the fee earner to hunt down information away from the familiar Microsoft Office environment.

The alternative is to spend more time and money creating interfaces, workflow procedures and bespoke integrations so that the different systems can talk to each other and consolidate information.

By using the .NET Framework and API technology, Aderant and FWBS have been instrumental in overcoming this issue.

This underlying Microsoft technology, launched two years ago and now rapidly gaining momentum as the connectivity platform of choice for professional applications, provides the means to pull all the information together from best-of-breed applications, and deliver it to the lawyer in an organised way.

As two of the UK’s few Microsoft Gold Certified Partners, FWBS and Aderant have equipped OMS Matter Centre and CMS.NET with the most comprehensive inter-application communication capabilities available.

“WE NEEDED TO UPDATE OUR ACCOUNTS AND ACHIEVE MUCH CLOSER INTEGRATION BETWEEN THE BACK OFFICE AND FRONT OFFICE SYSTEMS. THERE ARE SOME ALL-IN-ONE SOLUTIONS AVAILABLE BUT WE DIDN’T FIND ANY THAT WOULD SUIT OUR NEEDS BETTER.”

David Pearson, Chadwick Lawrence

While an increasing number of software applications in today’s marketplace claim to be .NET-enabled, many have simply had one or two .NET tools added to them. OMS Matter Centre, on the other hand, has been built on the .NET Framework from the ground up. As a result, it is the first legal application in the UK market to enjoy .NET Connected status, and be included in Microsoft’s .NET Connected Directory.

A JOINED-UP PRACTICE MANAGEMENT BLUEPRINT

BRINGING SPECIALISED OPERATIONS TO THE STANDARDISED DESKTOP

Other approaches to matter-centricity require users to master specialist systems or exchange data with external third-party applications. The OMS Matter Centre system with optional File As You Go capability enables the delivery of information through the two applications law firm staff are already most familiar with – Microsoft Word and Microsoft Outlook.

Apart from minimising both training requirements and the time elapsed before the system starts generating a return on investment, because OMS Matter Centre works within Microsoft Office it leaves lawyers and law firm staff operating within their existing technology comfort zones. Thus the information is there where users need it – in email, diary, contacts and word processing applications – and can automatically be stored against or retrieved from the matter files they are working with on a daily basis.

By opting for this extended functionality, it is possible to open up a new matter – including setting up the client details, complying with all the Rule 15, conflict of interest search and anti-money laundering rules, sending out and filing initial correspondence and client care letters and setting file review dates – from entirely within Microsoft Word.

THE MATTER CENTRE: DESIGNING THE PRODUCTIVITY REVOLUTION

Making maximum use of the advances available in Microsoft Office System 2003 – including Microsoft Smart Docs/Smart Tags technology for faster information retrieval and Research Panes to aid multitasking – OMS Matter Centre builds on FWBS's legal sector experience to provide a comprehensive matter-centred solution.

"WE IMMEDIATELY STARTED TO SEE THE BENEFIT. IT WAS VERY EASY TO IMPLEMENT AND TRAIN UP ON – IN FACT SOME OF OUR PEOPLE DIDN'T NEED ANY TRAINING AT ALL, IT'S SO FAMILIAR AND INTUITIVE."

David Pearson, Chadwick Lawrence

Operating within the familiar desktop environment, yet designed by lawyers for lawyers, the system offers a large number of templated documents and processes, as well as the facility for full customisation. However, unlike most boxed software products that take time to implement and reach full capacity, this level of functionality is delivered almost immediately via OMS Matter Centre.

Other automation and productivity features on offer include the ability to measure the usage of precedent and document templates (which can have a big impact on productivity) and the time-recording and management of the processing of incoming emails and attachments.

Full compatibility with Microsoft's various remote and mobile working technologies also offers the ability to deal with new information while out of the office, equipped with a Tablet PC or wireless PDA, for instance.

FILE AS YOU GO, MATTER-BASED EMAIL MANAGEMENT

Using .NET technology and the familiar Microsoft Outlook interface, the File As You Go functionality within OMS Matter Centre allows law firms to profile every new and existing incoming and outgoing email against matters, to and from specified locations – even with attachments.

Designed as either a mandatory or optional method of allocating emails, File As You Go works in the here and now rather than at a later date. So all emails are automatically stored by client or matter, whether historic or current, for easy and instant access to the information required.

Automatic email profiling further reduces the risk of mis-filing as the default is performed intelligently with very little user interaction required. Only a single click of the mouse is needed to ensure all emails are profiled and de-duplicated.

Emails can be filed by or moved to a generation of matter folders accordingly, or stored against multiple matters if required. Users can also multiple-select a batch of emails and bulk-load them into a single matter profile for easy referencing.

Personal inbox management and email stores are integrated within the File As You Go manager for a simple local matter folder structure. This means that all matter-centric email communications can be found in the most logical location, gaining law firms total visibility over the high levels of sent and received emails, within certain locations.

Even external emails can be checked as File As You Go offers Checksum tagging to ensure the validity and accuracy of each email on its return. Therefore, the response will be automatically profiled with no additional input required from the user, apart from the validation of the details.

INTEGRATION WITH PRACTICE MANAGEMENT

While numerous other legal systems provide access to data, the OMS Matter Centre system integrates with leading back-office Practice Management Systems (PMS) to offer lawyers immediate and intelligent access to all documents on a particular client or matter – giving a context to any piece of information from a single application within Microsoft Office.

“OUR PRODUCTIVITY HAS SOARED IN THE FIVE MONTHS SINCE WE’VE BEEN USING OMS MATTER CENTRE. TODAY, IT TAKES APPROXIMATELY 20 MINUTES TO AMEND 100 FILES – A QUARTER OF THE TIME IT USED TO.”

Steve Turner, Gill Akaster

This removes the need to link several diverse systems together, each containing islands of information as OMS Matter Centre effectively ‘opens a window’ to matter-centric information from a variety of locations across a range of disparate best-of-breed systems.

So law firms get a single system that pulls in information, stores it by matter and then delivers it in the most useful way, through the Microsoft applications that lawyers already use on a daily basis – Microsoft Word and Microsoft Outlook.

OMS Matter Centre is able to link these diverse information sources together using best-practice PMS, including Aderant’s CMS.NET support for the back-office process and powerful management reporting capabilities.

CONCLUSION

With today's lawyers redefined as the 'information workers' or 'knowledge workers' of legal know-how, it is imperative that they can access the information they require with ease. Without this, law firms would simply cease to run efficiently and profitably.

Modern business life has dictated that technology will be key in achieving this level of accessibility, by providing the tools to manage and manipulate all this information. There is also a business case to be made for streamlining this access in the way that law firms actually work, by matter or case.

Yet, while most systems are able to provide their own islands of information, only OMS Matter Centre from FWBS offers law firms up-to-the-minute, virtual matter files through integration of best-of-breed systems for comprehensive office, practice, case and even email management using optional File As You Go functionality.

Built on the Microsoft .NET Framework, OMS Matter Centre is unique in bringing this capability to lawyers via the applications they are most familiar with – Microsoft Word and Microsoft Outlook.

The File As You Go email solution – whether stand-alone or fully integrated within OMS Matter Centre – tackles one of the biggest issues law firms face today; the tracking and filing of information stored within emails. What makes the FWBS system particularly different however – apart from its ease of use – is that, because it profiles and stores all emails, it can be implemented without any loss to email archives.

Put simply, it handles the emails already in the inbox, the emails that have long since been filed away and the avalanche of emails that are delivered daily.

With intelligent defaulting an integral part of File As You Go functionality, the system has the ability to intelligently profile and store emails that are central to the matter or matters in hand.

"IT'S THE ONLY SOLUTION WE'VE SEEN THAT USES METADATA TO TRACK EMAILS THAT HAVE BEEN OUTSIDE THE SYSTEM, SO THAT THEY CAN BE FILED AUTOMATICALLY."

Clive Knott, Olswang

This automates the task of producing the traditional manila case file, and returns the traditional way of working to the modern law firm. The real difference however is that it is now even easier, with less risk, more commercial viability – and instantly available in a single click of a mouse, where it's needed.

For more information, please visit www.mattercentre.net/email

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