

Special Focus: Practice Management & Technology



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Effectively manage your practice online by leveraging technology

Commentary

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As a partner of a boutique law firm in Southern Pines, I certainly have my hands full. My firm, Law Offices of Place & Hanley, PLLC, handles cases in securities and commodities litigation, family law, wills and trusts. I operate the firm with my co-founding partner and husband Randall C. Place and our support staff.

In addition to our office in North

Carolina, we maintain two offices in Florida—one in West Palm Beach and the other in North Fort Myers. The majority of our securities clients nearly 95 percent, in fact—reside in Florida, and we consistently travel to Florida to handle arbitrations, mediations and meet with clients.

Not only do Randall and I strive to



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meet the legal needs of our clients, but we must also run the office and manage our employees. Between e-mail, document-processing and the need for frequent remote access, technology has become a necessary part of our daily work. Therefore, we are always looking for ways to build efficiency and increase productivity by implementing technology and legal software applications.

Scanning has become an integral part of our document workflow. Our office routinely scans incoming and outgoing pleadings so that the attorney can im-

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diately review documents from any location. Additionally, by scanning pleadings, we are able to keep our clients up to date on the latest occurrence in their case.

As a result of our scanning policy, our office is moving towards being paperless, which simplifies document management, in addition to being better for the environment.

In the near future, we will also implement videoconferencing which will allow us to communicate face to face with our staff as we travel.

Additionally, from a wireless communication standpoint, our entire staff is equipped with BlackBerrys so we can e-mail on the go.

Also, I have a wireless card for my laptop so I can check e-mail and work remotely from whichever office or location I may be at on a particular day.

The keystone of our technology is a Web-based practice management system called Clio, which is developed by Themis Solutions Inc., a Canadian software company.

We discovered Clio in late 2008 while looking for a Web-based solution that could support the demanding requirements of our practice. Within minutes of activating our trial account,

our entire firm was up and using the software with relative ease, storing contacts, case information, appointments and documents.

Time entry is simple, which was a welcome change from the cumbersome manual methods we had been using. And, where it used to take us three to four days to generate our bills, with Clio the whole process takes less than two hours — clearly a significant return-on-investment and a huge gain in terms of time that is now available to assist clients.

Best of all, regardless of where I am, provided I have my laptop, I can access Clio and work as effectively as if I were sitting at my desk.

Clio provides us with secure online access to our data from any Internet connection, with consistent quality of service and responsive performance. Initially, we were concerned about housing our data online, but were reassured to learn of Themis' proactive security measures including: SSL encryption, frequent backups and data escrow policy.

These measures ensure our communications are always secure, our data is fully redundant and that regardless of the fate of Clio, our data is always owned by us and will remain accessible.

For a low, predictable monthly

expense, we've bought ourselves access to unlimited technical support and product upgrades, and we've alleviated the need to maintain our own systems or worry about backing up the information. At this point, we have transferred over all of our practice information, which took only a few days.

In addition to the abovementioned technology advances, we recently revised our Web site (www.placeandhanley.com), adding some new state-of-the-art features.

The site has a direct-call link through ZiffTalk click-to-call service. Site visitors click on the icon on our homepage and they are immediately connected to our receptionist. Also, we have added a link for people to contact us via e-mail and have installed a GoogleMaps link so people can easily get directions to our offices.

Putting all of our information online has dramatically improved the efficiency of our firm's legal workflow and has reduced overall costs, both in terms of time and money.

We have taken advantage of the latest advances in technology and have leveraged them to improve our work output and lifestyle as well. Having a virtual office completely online means that we are always connected and that kind of convenience is valuable beyond compare when you're running a busy law office.

