



Five Technical Features that Differentiate Systems

Does your system have any of these?

by Jim Hammond, president, RainMaker Software, Inc.

1. Two-way Integration with Outlook Exchange:

It sounds so easy, yet very few systems offer full two-way integration with Microsoft Outlook/Exchange Server. Attorneys should be able to add contact names and docket events into Outlook for immediate updating into the marketing database and main docket system. It is relatively easy to export this information into Outlook. Starting in Outlook is a totally different world. Your vendor needs to provide validation look-ups for such items as client and matter names, docket type events, branch offices, etc. More advanced systems will also provide fail-safe features such as an email alert to the system manager if the Exchange Server fails to write data to the core system, and a way to re-run the entries that were not updated.

2. Microsoft .Net Technology as a Core:

Very few systems today have been completely re-written to take advantage of Microsoft .Net Technology. The web sites claim .Net, but other than a few peripheral web-based modules the entire core is "model T" technology. Savvy IS departments are insisting on a Microsoft .Net architecture. It reduces the cost of system management, improves reliability and insures technology support. IS staff is tired of dealing with "DLL hell" and Windows registry issues between applications. Besides it's almost impossible to find a top notch software developer today who wants to work on anything but Microsoft .Net. Maybe your vendor can find junior people to enhance their non-.Net products.

3. Ultimate Reporting Flexibility:

The number one frustration faced by system users is the in-ability to get useful information in the format they want. Some vendors respond with very expensive 3rd party products like Business Objects, clumsy ODBC type Excel connections or more commonly expensive custom programming and they will attempt to sell a wide range of expensive reporting software licenses ("I'll take 3 development and 5 viewer licenses"). Firm management should expect its vendor to provide standard tools like Data Warehousing/Business Intelligence, Digital Scorecards and the ability to modify all standard reports. Tools such as report writing should be provided as firm-wide licenses at no additional fee. All reports across all modules and technologies should be available in native Excel formats, not downloads. Financial reports should be available in Excel Pivot Tables, without the user understanding how to build them. Can all of your system reports be scheduled for automatic electronic email distribution? Why not?

4. Workflow and the New Client Intake Process:

One of the least automated processes in a law firm is new matter intake. It just sort of happens. It is almost impossible to manage as it involves duplicate data entry into dozens of different systems and costly delays. With

today's electronic new client intake workflow tools, firms can manage the entire process. New client information is entered only once, approvals are done via email and client work can begin the moment final approval takes place; saves valuable staff time and money.

5. Conflict Searching for Terrorists Requirements:

With the latest unfortunate attacks in London, firms are finally starting to pay attention to the Specifically Designated Nationals (SDN) List, published by the US Treasury Department's Office of Foreign Asset Control (OFAC). OFAC prohibits attorneys from accepting fees from any individual or organization shown on the SDN list. Failure to comply with OFAC regulations can result in a \$1 million fine if unintentional and up to \$10 million along with 10 – 30 years in prison if intentional. The proper Conflicts system allows the firm to download new SDN lists from the Treasury Department's web site and automatically import it into specially designed OFAC database tables. Searches can be immediately performed on the newest SDN List. Since the SDN List is periodically updated, OFAC allows a firm to subscribe to a notification service that alerts the firm when a new list is available for downloading. Routine changes to the SDN list include both additions and deletions. Does your vendor provide this technology standard in your system?

About the Author

Jim Hammond, president of RainMaker Software Inc., has more than 25 years of law firm software experience. RainMaker provides mid-large law firms with proven, practical and progressive case/matter management, financial management, practice management and business intelligence software. He can be reached at jhammond@rainmakerlegal.com.