



Law Firm Business Activity Management (BAM)

Managing Electronic Workflow Processes

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The Problem

Few firms set standards of performance for key functions. The internal flow of processes just sort of happens. Many have written procedures, but since most of the work is manual, there is no practical way to measure, or manage to a set of standards.

Electronic Workflow with BAM

Managing business activity becomes much easier when electronic workflow is used to automate routine chores. Firms can set baselines of expected performance and then allow the system to monitor actual conformance to the requirements. Electronic workflow virtually eliminates paper, shortens response times and substantially improves productivity. Using BAM, an Executive Director at a law firm is much like an air traffic controller watching a radar screen, while controlling the air space. Careful planning and constant feedback assures no delays or mishaps. Without it, radar mishaps would be discovered not prevented.

Email Approvals – A Simple Process

SmartAlert type emails provide the most graceful way of routing and approving workflow processes. The workflow system sends an email to an individual with instructions to complete a specific task. With today's web-based technology, this can include a hotlink directly to a task screen within the workflow product. An email can also include fields for data entry or approval. So, for example, an attorney can approve a conflicts search within an Outlook email message. The workflow system monitors the time it takes to complete a task, thereby managing the business activity.

Notifications of Workflow Delays

The firm has defined the process of completing step one of electronic data entry for a new case intake form, allowing the user two "business hours" to complete the task. If the process takes more than two hours, a manager is notified of the delay by another SmartAlert email explaining the situation to a manager. The email can indicate the actual user entering the information, the start time, the expected completion time and the current status of the process. Since the process is critical to the firm, a manager may easily route the task to another user, or make alternate decisions. With BAM there is a built-in audit trail that time and date stamps all processes; a permanent record of what has transpired.

Courtesy Email Notifications

Many times, a firm will set up the workflow system to broadcast courtesy emails, notifying the attorneys or staff when various events have taken place. For example, in our new matter intake process, the originating attorney may want a courtesy notification when a conflict search has been approved. Assistants who start the intake process find it beneficial to know that it has completed all the required steps.

It is also helpful to know that a client matter number has been assigned and that work can begin on the engagement. Attorneys like the feature that provides a consolidated daily or weekly recap of all new clients or matters originating. In this case, the SmartAlert is a consolidated report-type email that shows the business activity.



The screenshot shows a web-based notification window titled "New Case Step Approval" from RainMaker Software, Inc. The window is addressed to Lak Ayyar and informs him that Jim Hammond has completed Step 2 (Advanced Input) for a case involving ABC Company vs. XYZ Inc. The notification includes a deadline of 09/01/2004 09:00:00 AM and a link to access the case details. Below the text is a "Notes" field and three radio buttons for selecting an action: "Approve Step", "Decline Client/Matter", and "Request Additional Handling". An "OK" button is also present.

RainMaker
SOFTWARE, INC.

New Case Step Approval

Notification

Lak Ayyar,

This Email notification is being sent to inform you that Jim Hammond has completed the Step 2 (Advanced Input) for ABC Company vs. XYZ Inc. You are required to review this New Case and approve this step on or before 09/01/2004 09:00:00 AM.

Click here to directly access this Case or its current status:

<http://localhost/e-rmplatinum/newcase/NCMStep.aspx>

Notes

Approve Step Decline Client/Matter Request Additional Handling

Conclusion

Business Activity Management becomes much easier when the firm implements electronic workflow. BAM will facilitate faster response time to clients, lower costs and insure quality and accuracy. The best news is that it is affordable and easy to implement.

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.