

Portals, Intranets, and the Internet - What Firms Need to Know

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“He who hesitates is lost” are words that carry even more urgency today than in 1712 when Joseph Addison introduced the phrase into the popular lexicon. The increasingly rapid rate of change has created an environment that is often harsh to organizations that delay investigating new ways of doing things and adopting innovative tools and methods to gain an advantage over competitors. This has been labeled the “Information Age”, and the abundance and universal availability of information has been a great leveling agent on many fronts, including the legal profession and industry. Competence and hard work are no longer sufficient, by themselves, to guarantee success. Success will be achieved by those who, in addition to being competent and hard working, master the oceans of data swirling around them by channeling, filtering, and refining it into information which is then harnessed towards decisive and informed action.

Most law firms today do not suffer from a scarcity of data. In fact, just the opposite is often true. Most law firms today are overwhelmed with data which is manifested in countless reports, a plethora of databases, and so many inquiry screens that few people are sure where to go for answers. The firms that will thrive in the Information Age are those that can aggregate the data into information sets relevant to and useful for various people’s responsibilities and objectives. Additionally, these information sets must be delivered via a mechanism sufficiently convenient to ensure people actually access and utilize the information, without distraction from their primary activities. Finally, as competition continues to increase among law firms, clients are becoming more demanding and more apt to switch firms. Establishing and maintaining client loyalty is more difficult than ever before, and only likely to become more so. As daunting as these challenges may appear, there are technologies available that successful firms will utilize to hurdle these challenges and put distance between themselves and their competition. Some of the more prominent and critically important technologies in this arena of competition are Portals, Intranets, and websites.

Portals

Portals, residing over intranet or website infrastructure, are created with software which law firms can use to present ordered information sets aggregated from what is often a disorderly assortment of data scattered across multiple sources, such as time and billing applications, databases, websites and others. In this context, “ordered” information means it is easily accessed and is assembled to be relevant to the needs and objectives of the persons accessing it. Delivering information in this manner can significantly increase the value which can be extracted from data available to an organization.

For example, a managing partner is interested in maximizing certain parameters of attorney performance, such as realization percentages, effective billing rates, and achievement of billable hours objectives. While most firms have this information, it is often buried within the data in their time and billing system. Perhaps the managing partner cannot take time from other pressing activities to dig for and find this information. Or, perhaps the information is available to the managing partner, but only in reports that are so outdated and difficult to decipher that they encourage being set aside. Either way, the information’s potential value to the firm is not realized and the firm’s profitability can suffer as a result. Instead of taking actions based on information, the managing partner may rely on “gut feel”, or may not even realize that situations exist which require action.

However, if information about attorney performance is automatically assembled from various data sources and delivered on a timely basis, in a comprehensible format, in the managing partner’s portal, s/he can be continuously informed of the status, changes, and trends in attorney performance without disrupting other activities. Information from the portal will keep the managing partner aware of what needs attention and

provide guidance for decisions.

Delivering automated self-service capabilities is another way portals can reduce paper traffic, improve organizational effectiveness and get information to the right people at the right time. Most law firms print stacks of reports that are distributed periodically. Paper reports are notorious for arriving late, getting misplaced, being overlooked, and otherwise not being utilized to their full potential. For example, the common manual process of distributing paper client prebills can lead to delayed invoicing of worked time, and waste staff time in chasing down edited prebills.

Complementary portal tools can be leveraged to provide various enhancements to the content delivery in portals. In the example of prebills, automatic generation of prebills in Excel® spreadsheets, with data populated from the production billing system, could be delivered to attorney portals. The attorneys would have instant and convenient access to their pre-bills, and could edit them online, or detached from the network on their laptops. When completed by the attorneys, the edited prebills could automatically be available to accounting for finalization into client invoices.

As another example, portals can be an excellent way to deliver up-to-date "snapshots" of information on critical dimensions of the firm's operations, such as cash receipts or client investment. Portals also provide a platform to make data and related analytical tools available for decision makers to gain insight into what is driving positive or negative results in the firm so they can take action based on knowledge.

Intranets

"Intranet" is a term that most commonly refers to a private network, internal to an organization, which utilizes web technology, such as protocols and user interfaces. Intranets can deliver value by providing people with a consolidated, consistent, and easily navigated window into the organization. Portals, incorporated into a firm's intranet implementation strategy, can significantly boost the return on investment of technology expenditures for the underlying Intranet.

Intranets can help people work more efficiently by simplifying navigation to firm resources and applications. Instead of having to refer to lengthy "cheat sheets" or peruse endless directories to find infrequently accessed systems and resources, links to these can be collected into one convenient place with an intranet, making them easy and quick to locate and access.

Intranets can also facilitate cohesion and collaboration within firms. The firm's intranet can be the "village commons" where firm news, policies, values, and other areas of importance can be communicated consistently and immediately to everyone at the same time. People working together on projects can utilize the intranet as a platform to provide team members with shared access to resources needed for the projects and a method for members to remain coordinated, with each member aware of the group's efforts and status.

Websites

Websites are ubiquitous for law firms today. They have virtually become a minimum requirement for being in business. Law firm websites are useful in providing information about the firm to prospective and existing clients. Websites often create the first impression about a law firm, and can be instrumental in establishing and promoting a firm's image.

But, very few law firms carry the impact of their websites beyond the typical, such as providing information about practice areas, attorney profiles, and directions to office locations. Much potential remains to be tapped by law firms who want to leap ahead of slower-adopting firms and leverage technology to use their websites as mechanisms to deliver better client support and forge stronger client loyalty.

Providing clients with portals that can be accessed through the firm's website is one way a firm can open up a wide array of new capabilities clients can benefit from using. For example, a portal could give clients the ability to access their invoices immediately, upon creation, in the format that suits their preference. Client portals can also be a convenient method to enable collaborate access to common documents related to matters in a way much more convenient to clients than traditional methods. Or, specific targeted communications could be exchanged via the client portal. Client portals hold the potential for firms to develop new ways to forge and strengthen client loyalty and foster genuine partnership between clients and the firm.

Summary

While many technical innovations that were once novel have now matured, such as word processors and fax machines, portals, intranets, and websites, although having been around for several years, are still in their technological youth. A great deal of new and exciting possibilities exist to be comprehended and exploited with these technologies. The successful firms in the future will be those which keep up with and tap into the opportunity to make the improvements in the quality of their operations and client services these technologies will enable.

About the Author

George Rogol, Regional Sales Manager for RainMaker Software, Inc., has more than 20 years of experience helping organizations leverage technology to meet their challenges. RainMaker provides proven, practical, and progressive Financial Management and Practice Management software, along with Business Intelligence and Microsoft® SharePoint Portal Integration to mid-large sized law firms. Mr. Rogol can be reached at grogol@rainmakerlegal.com or 610.621.2953.