

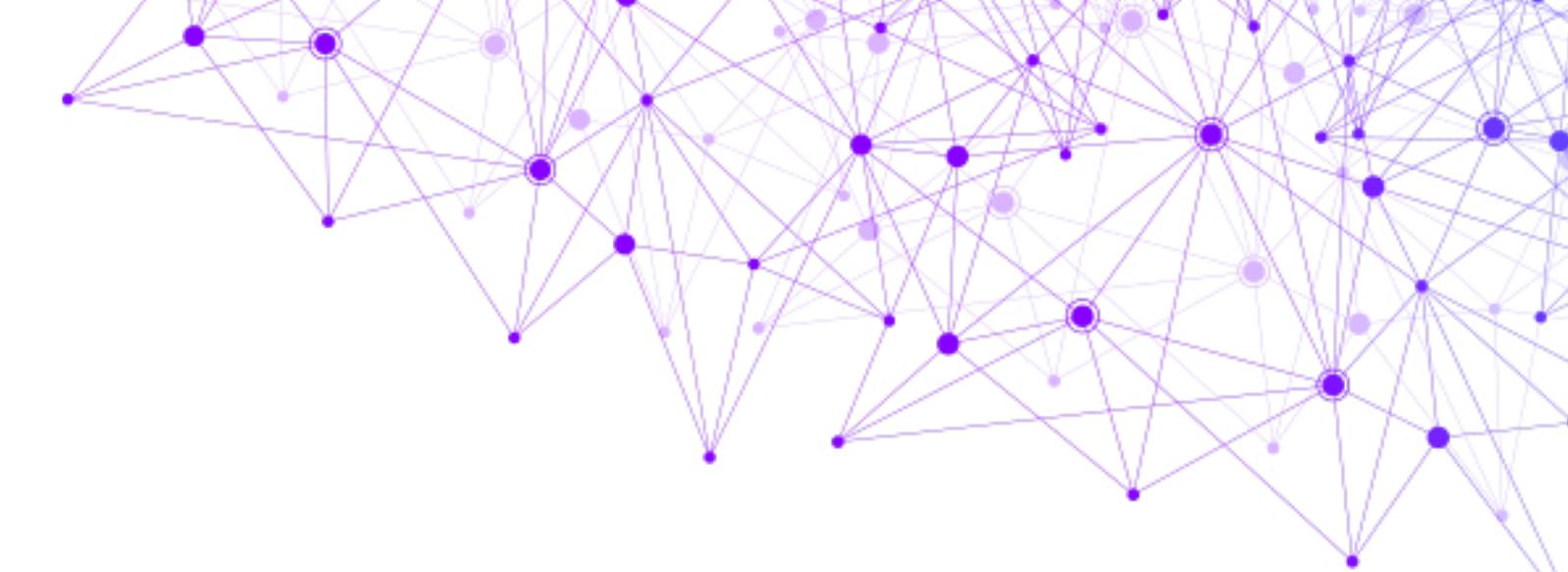
HOW TO PUT MOBILITY TO WORK FOR LAW FIRMS

11 Legal Business of Law Processes
Lawyers and Allied Professionals
Can Streamline with Mobility

A LEGAL BUSINESS REPORT BY ADERANT

Aderant

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A complex network diagram with purple nodes and connecting lines, filling the top portion of the page.

EXECUTIVE SUMMARY

When we visit law firms around the globe, we are often struck by just how many firms are still reliant on paper and paper-based legal business processes. Even at firms with paperless initiatives, we'll see billing partners packing up stacks of pre-bills to review and edit in the evening at home.

Paper is cumbersome, error-prone, slow, and adds more touches to the process, in a business where every touch costs money. In the digital age, it's unnecessary and excessive. So why is paper so persistent?

When we talk to business of law professionals at firms some indicate the mountains of paper are simply unknown to law firm leadership. There's little awareness of what's truly possible with mobility and even those that fancy themselves tech-savvy may not understand the extent of the capabilities mobility can add to a law firm.

This Legal Business Report (LBR) describes the benefits of mobility in a legal technology context, makes the case for implementing mobility, and finally, details the many legal business process firms can streamline, automate and expedite with mobility.

Introduction: An Hour's Ride to the Law Firm on Saturday

A lawyer was trying to get a pre-bill approved. She had entered her time and notified the partner. He was on holiday and didn't have access to his desktop computer at work – and that brought the pre-billing process to a halt.

Why? He needed that machine in the office to click the “approve” button.

With the client deadline for invoicing approaching – which by the outside counsel guidelines meant the firm could not submit the bill – he asked her to do it for him. He communicated his password and she drove an hour into the city, went into his office, fired up his computer, navigated to the pre-bill at hand, and clicked the “approve” button.

Then she drove an hour back home. It was a Saturday.

That's a true story, and unfortunately, it's not uncommon. It's also unnecessary because the mobility component of modern legal IT systems means approving a pre-bill can be done easily and securely from a mobile device from anywhere with an internet connection.

Firms can have the same breadth and depth of access to their systems – practice, financial, case, matter and document management – that they have in the office. That could be at a client lunch, on a plane, or clicking “approve” on a pre-bill from a holiday destination on a Saturday morning.



Why do Law Firms Need Mobility?

Productivity and efficiency certainly come to mind as reasons to provide lawyers with on-the-go access to law firm information systems through mobility. Productivity is the rate at which work is completed, whilst efficiency is the ability to improve that productivity rate with the same resources. Both of those attributes can be enhanced with access to the right information that eliminates the need to ask a question and then wait for an answer.

Why shouldn't a new matter request move forward, or an associate's expense report get approved just because a partner isn't at their desk? If the partner can review and approve these things on a tablet, in between meetings, or from the comfort of home on a Saturday, why not keep the process moving forward?

Clients expect that level of efficiency too. Many just aren't willing to wait for a lawyer to call the finance department to find out the status of the budget for a matter. And they shouldn't have to since the capacity exists for a lawyer to pull that information up on tablet and show the status, in detail, right there at that moment.

Clients' expectations hint at how mobility has permeated the legal culture. There's an entire generation of lawyers in the workforce today that have grown up with mobility and struggle to understand why it's necessary to be physically in an office to access all the information they need for work.

Prerequisites for Law Firm Mobility

One of the biggest mistakes law firms make at the beginning of a mobility initiative is merely trying to replicate the entire desktop experience on a mobile device. This effort misses the mark because it isn't supporting a specific need. Lawyers who work on complex legal problems may, in fact, find some tasks do require a desktop – so it's better to define a problem or a specific set of needs and focus the mobility effort there.

For that reason, mobility is best as an inherent part of any modern IT system. For many years, the industry would develop a product for the desktop – and then look for a way to add mobility post-production, or worse, post-implementation. Mobility wasn't part of the original plan – and it felt that way to users as well.

Today, mobility is – or should be – part of the initial system blueprint and architecture. This helps ensure the mobile version not only works as intended – but works in a way that enables productivity and efficiency.

Therefore, the mobile experience must be different for a lawyer than conventional applications, or “apps.” Many apps today fire off alerts and notifications to keep people coming back – and to keep them staying longer. Mobile apps for law firms need to take a near-opposite approach: first, the app should help lawyers find answers quickly, and second, direct attention to those items that need action.

Here is a current list of statistics summarising the state of mobility in law firms today – and the opportunity to improve a law firm's competitive edge.

- An average of 36% of allied professionals have access to email on a wireless device; the larger the firm, the higher the average percentage;
- An average of 29% of lawyers use tablets or iPads in their practice;
- The Apple iOS has penetrated 90% of firms, with the Google Android in use at 80% of firms; Blackberry has 19% penetration and Windows Mobile just 10%;
- 92% of law firms force the use of passwords to unlock a mobile screen;
- 38% of law firms buy smartphones for lawyers (which means BYOD is in effect);
- Lawyers use laptops as “their primary remote-work device” (44%), followed by smartphones (30%), tablets (13%), and non-work desktop computers (12%)

Law Firms and Mobility by the Numbers

Prerequisites for Law Firm Mobility

Law Firms and Mobility by the Numbers

- 96% of lawyers use a smartphone to conduct legal work at least some of the time;
- 75% of lawyers use iPhones; 23% use Android devices, and about 2% use Blackberry or Microsoft phones;
- 50% of lawyers say they use a tablet for legal work; of these, 81% are iPads;
- Just 42% of firms “have a written policy about mobile device usage for firm work,” meaning that most lawyers have no written guidelines about data security and file access for remote work from mobile devices.

Sources: ILTA'S 2018 Technology Survey and the 2017 Mobile

Technology as part of the 2017 Technology Report by the ABA

The answer to the innovation question of apps is easy if you look to the banking industry, as one legal business transformation professional we spoke to said:

“When I started in banking you couldn’t walk in to a branch and get a view of all your accounts - you’d need to type in the account number and get a pass book made up. Now you can log into a smartphone and open an app, use a fingerprint to gain access, and have all your banking information right there - and move money everywhere in multiple currencies. That hadn’t been driven by a regulator or a customer - the banking industry saw what it could do for their clients. Only then did it become part of the competitive landscape. First, the industry innovated - and the industry’s innovation built its own customer demand/appetite. People wanted to be able to manage finance online, then open and close accounts, then other products - and before you know it you have 24/7 access with most products.”

The innovation of the banking industry can set the path for better usage of app notification systems. Banking apps will often only notify the customer about very specific, often user selected circumstances, such as overdrafts or suspicious activity. As for mobile apps for law firms, good examples of possible notifications include delinquent time entries, billable targets, or pre-bills that are ready for review. It’s highlighting things that need to be completed to keep a business process moving along - and allows a lawyer to do them quickly and then continue with the workday.

Start with Lawyer Enquiries; Move to Actions

When we think of a well-defined problem, we think of specific use cases. One of the best ways to identify those use cases is to think about the common questions lawyers ask. In other words, when lawyers call allied professionals what are they looking for?

We find a common enquiry for information, that could easily be delivered at scale through smartphones and tablets, as a great starting point for mobility. Here's a list of common questions lawyers in law firms ask – and may look familiar:

- Can you send me the last invoice for client x?
- What's the accounts receivable (AR) balance for client y?
- How much of the AR is over 90 days past due?
- When did we last invoice client z?
- When are we next billing client x?
- What's work-in-progress (WIP) for client y?
- Can you send me a copy of the receipt for the hard distribution on client invoice no. 123?
- What was the last discussion around outstanding payments for my matter z?
- Which lawyers are working on my matter x? (for large cases with multi-office teams)
- When was the last time entry entered for matter y?
- How am I doing from a billable hour target perspective? Current period, YTD?
- Have we received payment for invoice no. 456?
- Does matter z have any available trust or retainer balances?
- As a billing lawyer, what's my total AR or WIP?
- Who hasn't finalised time on my matter x?
- What receipts came in today or yesterday for my matters?
- What was the last payment from client y?
- What are the outside counsel guidelines for my matter z?
- Do any of my matters have a large amount of WIP outstanding?
- Do I need to approve any fee earners to work on a matter?
- Am I over budget for matter x?

Enquiries are a great place to start and will lead a firm to the next step: action. What are things a lawyer can do, that are suitable from a productivity and efficiency standpoint, from a mobile device?

11 Business of Law Processes Law Firms Can Streamline with Mobility

The partner that asked their lawyer to drive into the office one a Saturday merely to approve an invoice probably isn't aware of the possibilities with mobility. This section provides examples drawn from real-world mobility implementations other law firms have in place today.

1) Obtain client data from anywhere at any time.

Obtaining client data is about empowering lawyers by providing self-service access to information. Any sort of information - with real-time data - a lawyer might need about clients or financials are at their fingertips with mobility - even in the back of an Uber ride on the way to a client meeting. It reduces the reliance and disruption to the allied professionals, such as billing and accounting staff.

2) Access case management or matter information.

Lawyers need continued access to the day-to-day activities that move a case forward. Whether it's a legal assistant, a paralegal, or a billing partner, this about providing access to neatly organised information about appointments, documents, and outstanding task related to the case.

3) Comprehensive time entry and time management.

Time entry is so hard for many firms - and mobility is one way to make it easier. Of course, you'd expect the ability to enter time, but the better apps provide comprehensive time management. This means the ability for a billing partner to review time entries from his or her team and make edits as needed.

For those who prefer to keep time contemporaneously, a timer is available. Advanced apps also include time reconstruction features - where the app helps comb through emails, calendar items, documents and phone logs to help a lawyer identify billable time gaps they have yet to enter. Mobility removes excuses for getting time entered on time.

We have observed firms, that have implemented mobility for time management, find user adoption outpaces traditional means of time entry. For example, even lawyers who historically relied on a legal secretary to enter time on their behalf, often start doing it for themselves. We've even seen lawyers develop such a strong preference for mobile time entry, they'll use the mobile app even when sitting at their desks.

4) Manage expenses on-the-go.

Mobility provides a firm's lawyers with the option of tracking expenses as they travel. For example, a lawyer can take a photo of a receipt which reduces the risk of losing the receipt or capturing the details behind it. A lawyer might choose to also fill in the details right there on the app, or simply include a comment or instructions that then get passed to a legal secretary to complete the rest of the entry.

5) Better disbursement accessibility.

Firms often incur expenses in the course of working a matter for a client – for travel or for an expert witness for example. Usually, these are billed back to the client along with the monthly invoice. Sometimes clients can't or won't pay these expenses if a copy of the receipt (or invoice) is not included. In those cases, a billing partner can very easily pull up the required receipt – or that of any other expense for a matter – and send it to a client. By comparison, this traditionally required a phone call to the billing department and a mad scramble to find a copy.

6) Initiate and approve billing actions.

The more sophisticated mobility tools are more than just an enquiry vehicle. These enable lawyers to take action. For example, if a matter is complete, a billing partner can quickly pivot from merely reviewing it to notifying the billing team and initiating the billing process. Indeed, from a lawyer's perspective, the entire billing process can be supported from a tablet – from initiation to invoice approval.

7) Review, edit and approve pre-bills.

The sooner a law firm can invoice, the sooner it gets paid. Streamlining the pre-billing process is a proven way to boost cash flow and margins. Mobility has a critical role in that pre-bills can be edited electronically from anywhere with an internet connection.

Instead of taking a stack of pre-bills home for the weekend, this can be done on an iPad. Edits to the narrative, the adjustment of hours, or transferring an entry from one matter to another is both efficient and easy.

There's one important benefit to this: a billing partner can see the impact of write-offs and write-downs to the total invoice as they are making edits. By contrast, on a written document, the lawyer who writes down an hour here and an hour there, in the course of editing a stack of paper, won't see the impact until the draft revision comes back from the billing team. That too could trigger another round of edits which prolongs the process.

Mobility brings a faster feedback loop and reduces the unnecessary exchanges with the billing team. Of course, it also streamlines the process, so the lawyer can get an approved bill back to the billing team to be sent out. This reduces the WIP-to-cash cycle time and gives the lawyer the benefit of doing edits from wherever they are.

8) Manage a book of business.

Good mobility apps allow lawyers to review inventory and WIP. This allows a billing manager or partner to manage matters, and especially WIP and AR balances. A lawyer can drill down into the AR balance from this tool and see all the invoices that are outstanding and even bring up a copy of the invoice if they want to have a look at it. They can see rate details, credit details, and trust balance information amongst many other items.

Firms that provide this type of access find lawyers tend to use it to self-serve information:

- What is the current WIP balance?
- When are we billing this client?
- What is the balance outstanding from AR?
- Where are we on collections?
- For balances more than 90 days old, what collections activity has been initiated?

This type of functionality often eliminates the need for a lawyer to call the finance department.

9) Support for collections.

Generally, fee earners have an important role to play in collections. Since this can be a dynamic process, having access to the current status, and capacity to collaborate with colleagues back at the office is pivotal.

A lawyer can view the summary of collecting activity, but they can also add information. If for example, a lawyer speaks to a client on site, who confirmed payment would be made in the next two weeks, that's an update the collections team would appreciate.

This also where the concept of directing attention to pressing issues works well. A mobile solution should surface collections activity for a lawyer to review.

10) Client budget reporting and management.

Lawyers have fiduciary responsibilities to be good stewards of a client's budget. Having access to real-time status information and understanding the legal costs associated with what's been done, as well as what still needs to be completed, are key elements in the process. Mobility provides this information in a simple and visual format.

It is especially helpful for legal projects or matters that are not billed on a monthly basis. A lawyer can look at a matter status, for example, and understand whether his or her team is 50 percent or 75 percent complete. In this way, they understand if a client's budget is on track or if the matter has turned out to be more complex than originally estimated and will trigger a conversation to re-negotiate pricing.

11) Better collaboration and workflow.

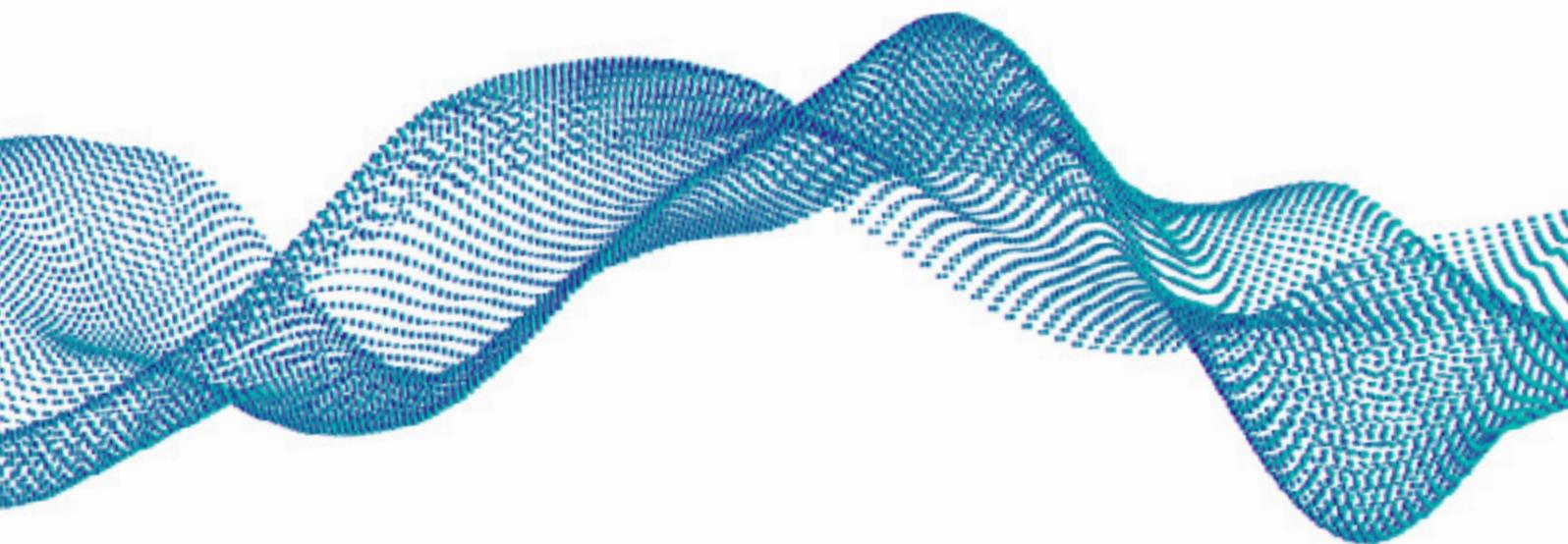
A key component of a comprehensive mobile framework is workflow. Workflow is a way of automatically moving a task expeditiously to the next step in the process when it's ready. Often this is done in a system, so the app will trigger an alert that directs attention, which eliminates the need for email. This accelerates approval time and provides a level of transparency since a lawyer can see where the holdup is if a review or approval is delayed.

A good example is a pre-bill process. When an entry is complete, workflow routes the pre-bill to the reviewer for approval. Sometimes reviewers choose to write down a bill, and since many firms have thresholds – say a 10% limit – workflow will automatically route an 11% write down to the appropriate partner for review. The partner can easily see the write-down amount and the rationale, and then approve or disapprove the action from a mobile device.

The business process to which this is applied depends on a firm's implementation. Common use cases we see amongst firms include:

- Conflict checks
- Matter intake requests
- Pre-bill process
- Invoice approval
- Expense report approval

It's a very simple task to review and approve items in workflow from a mobile device, so it's simply unnecessary to slow, postpone or stop a legal business process until someone gets back to the office.





CONCLUSION

Mobility has become a part of our culture to the extent the capabilities that come with it have shaped expectations of law firms. Lawyers and staff want the productivity that comes with mobility, whilst clients demand efficiency. More importantly, the business of law stands to benefit from both. There's certainly no need for an associate to make an hour-long drive into the office on a Saturday to turn a dial, pull a lever or push an approval button for any legal business process.

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