Tech Brief

Web-Based or Non-Web-Based CMS

By Tracee Wagner

A 2016 ABA survey found that only 46 percent of law firms have case management software (CMS)—and only 43 percent of those who have it actually use it.[1] But in today's world, CMS is a necessary tool. Tech-savvy clients expect immediate and consistent communication because they know technology makes that possible—and every client interaction matters. CMS improves client services by providing quicker access to case-related information, the ability to review a file's history at a glance, and a detailed summary of the last contact your client had with a staff member.

Most CMS programs include standard features: contact, document, and email management; keyword text searching; remote access; and the ability to sync with your firm's accounting software. But this still leaves a wide array of program features and options to choose from.

Web-Based or Not?

Web-based CMS is used over the internet via a web browser, so local software installation is never required. This means no IT issues to worry about, access from any browser on any device, included data storage, and monthly subscription fees per user.

Non-web-based programs always require up-to-date servers and computers that meet the product's system requirements, as well as an initial licensing fee. However, they do not rely on internet access, allow you greater privacy by preventing your data from being stored online, and offer advanced features—such as greater security; customization options (for example, integration with ancillary products and services like medical records retrieval and rules-based calendaring and accounting packages); complex reporting capabilities, such as the ability to organize cases by virtually anything they have in common; and more.

If you don't want to own and manage a server, but you want the sophisticated features of a true server-based database, you can use a private cloud or hosted server. A private cloud offers the server hardware, software, and support that a non-web-based program would have, but the hardware is physically located in a data center that your firm can remotely access.

A private cloud or hosted server can also offer full IT services, from printing issues to software updates, for a monthly fee. It also offers access from anywhere—all without having to upgrade your computers every few years.

Implementing CMS in Your Practice

The key to any successful software implementation is picking the one that's right for your firm, and then making sure your entire staff uses it.

Involve your team. Designate a group of people to scout out and vet the programs that might be a good fit for your practice. Feedback from the people who will be its most essential users is crucial. Take advantage of web demos or trial versions to test-drive different products.

Carve out the time to implement it correctly. Work with the vendor on an implementation time line that considers all of your users and their individual learning styles. Ensure your staff has enough time to customize the program to their liking by building libraries to

organize cases by status, priority, or type; creating templates; and defining user roles. Create a "how to" handbook for your firm that will become the go-to resource during the transition.

Do a test run. Schedule at least two data reviews with your vendor, and ensure data has been properly transferred. Then target an evening or weekend as the final changeover time to avoid disrupting firm operations.

Consider holding quarterly or yearly training sessions. Continuous training addresses weak links and prevents repeat mistakes. It helps employees improve their skills, keep up-to-date on the newest developments, and increase their productivity.

CMS can become an indispensable tool for your firm. By having these processes and protocols in place, you can ensure that your team members are on the same page and your legal practice is running smoothly and cost efficiently. ▪

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NOTE
1. Joshua Poje, *Practice Management—ABA TechReport 2016*, Am. Bar Ass'n, www.americanbar.org/publications/techreport/2016/practice_management.html.

Before you begin your CMS search,

Ask yourself...

1. **Do I travel often?**
   a) I'm always on the road.
   b) Rarely—I mostly handle local cases.

2. **Do I have multiple offices?**
   a) Yes.
   b) No.

3. **Do I own or rent your office space?**
   a) I rent office space, lease my car, and I like to upgrade my devices whenever a new version or product is available.
   b) I own—it's more cost-effective.

Ask your team...

1. **What is your most time-consuming task?**
   a) Keeping up with a file's calendar.
   b) Tracking and keeping up with all of the details: medical requests, records, liens, etc.

2. **Do you and your coworkers use the same forms for documents?**
   a) Not really. We have a forms database, but we don't really use it as much as we should.
   b) Yes. We also keep separate folders for drafts, final versions, and filed documents.

3. **Could you fill in for sick coworkers?**
   a) No—I'm not sure where and how they keep their documents and calendars.
   b) Yes—we have a shared drive, and I could probably find their client documents and see their calendar.

Ask IT...

1. **Do we have a server?**
   a) No. You have a computer that acts as a server and allows network sharing.
   b) Yes.

2. **Do we have fast internet and high bandwidth?**
   a) Yes. You have the best that your location offers.
   b) It's spotty and a bit unreliable.

3. **Can we have a shared calendar?**
   a) You can give rights to the attorney calendar.
   b) Yes—you have Microsoft Exchange, 365 Business, or Google apps, which allow for a shared firm calendar.

Ask other CMS users...

1. **Do you sync your CMS with your accounting software?**
   a) No, I don't like to have that information available to my team.
   b) Yes, it's great to have that information in the same place as my other client data. This way I can monitor negotiations, track settlements, and more.

2. **Do you use an intake company with your CMS?**
   a) No, my team answers calls and uses our own intake document.
   b) We import leads from our website or intake company—it's a great way to measure statistics of where our cases come from.

3. **How time-consuming is it to keep people up-to-date on cases?**
   a) I can generate a referral case list and see the status of my files.
   b) I log in and can see a dashboard that gives me case summary information. I can email this list to a referral source or cocounsel with the click of a button.

If you had mostly "a" answers, consider a web-based solution or a private cloud. You are an on-the-go lawyer who enjoys technology and appreciates a pay-as-you-go option for the newest and greatest whenever it is available. Your team needs a simple solution that offers a uniform platform so you can collaborate and be on the same page.

If you had mostly "b" answers, consider a client or server-on-premise software package. You're not totally sure about the "cloud" or a billed monthly option. Your team is relatively organized now—but craves more efficiency. They need a solution that will truly offer a one-stop shop.