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***The Perfect Office*
Sharing Information**

In this addition of *The Perfect Office*, we will explore the real value of sharing information. Do you have a dependable and accessible source for sharing data in your office? *The Perfect Office* does.

At a recent speaking engagement, I conducted a simple demonstration of how to recognize the challenges of sharing information. With a mixed group of business executives, we started a fictitious service business and acquired a reliable, inexpensive and easy to use technology—everyone got a legal pad and a pencil. We got off to a rocky start as we immediately had to call in a hardware specialist to provide a pencil sharpener, but we were soon on our way.

We assigned titles to our group from receptionist to CFO and role played a scenario with a single client from initial call to case closed. By the time we got our client through the first call, follow-up calls, case assessment, calendaring, correspondence, deadline tracking, billing, accounting and management reporting, it became clear that we had a sharing problem and that we were going to need some more legal pads.

As we looked over the numerous sheets of paper we had generated and passed around, our immediate consensus was that we needed a data source for client and case management information that could be used throughout the company. Ideally our system would allow the information to be input one time, and any changes or additions would update throughout our system.

OK, so we start with PIM (Personal Information Management). We'll create a place to put just the contact's information, including name, address, e-mail and other data that is always true for our individual or organization in any context. Let's also classify our contacts and expand our PIM to include everyone we come into contact with through our business. Empty out the Rolodex, Outlook, spreadsheets, sticky notes and other software data, and input them into our new system. It's OK, put in your hairdresser and the club house for those all important tee times. Oh, and lets design this so we enter our organization one time and link individuals to a master record and save even more redundant input while we make our information more user friendly. Sounds like the beginning of a great relationship database.

Let's move on to case management. We may have one or more cases for each client, and we certainly have other contacts involved in each case. We'll design *The Perfect Office*



database to allow us to simply link the contact information we have already input, while showing us the specific relationship the contact has to the case. Here we will want a place to put important information regarding each individual case.

Now its time to roll up the sleeves and start managing the practice. Practice management sounds like we never get it right. This means action—making phone calls, creating documents, scheduling events and tracking those pesky deadlines. The same rules need to apply. We should be able to use the data already entered and link our actions to the contacts and cases. But it won't be perfect unless we can include e-mail, Web research, mail, timekeeping, and transactions.

Well, we have certainly come a long way from our yellow pads, and we have lots of information to work with, so where do I go to work? Why don't we make a single screen workplace that can show us what events, tasks, calls, e-mails, documents, notes and whatever else we have on our plate for today-this week-this month? Since this is about sharing, we should also be able to see any combination of other staff's actions side-by-side.

I almost forgot that we'll need to see what's coming down the road. Someone should have reminded me. Make it simple, and include any action for today and for any future date that needs attention now. Share this so we can see anyone else's reminders as well. Put it all on a single screen.

In our exercise with our yellow pads, we discovered that sharing also included communication. My experience over the years has shown me that there are two simple types of communication: delegation and notification. Delegation is transference of responsibility from one person to another. Notification is interrupting someone with an in-your-face method of communication. In *The Perfect Office* both are needed.

Delegation is really a preferred method but relies on some assumptions. You must have the authority to delegate, and the person on the receiving end needs to have the responsibility to complete the task. The communication needs to be clear. Due dates are nice and priorities are even nicer. If everything that needs to be done is completed each and every day, then you won't need this feature.

Notification works only when it is not overdone. When I stroll down the hall in a client's office and the Outlook e-mail notification is dinging at every workstation, I start to flash back to the State Fair. I know one thing for sure, the most clicked button throughout the day is SNOOZE! Did you ever wonder what kind of "not so subliminal" message that sends? In one office, we had determined that the staff was being interrupted by notification more than five hundred times a day.



Alright, we'll just separate the two types of communication, and it will be perfect. Delegate to someone and it shows up on their "workplace screen" and they are responsible to get it done without the interruption. Notify someone, if you must, and the system puts it in their face. No snoozing. Enough said.

There are plenty of additional bells and whistles we can add to our system. The use of triggers (when this happens, make this happen) can help force procedures. Alarms and timers can help with the *no snooze rule* or help you time your nap. Other efficiencies can be gained when data can be inherited from one input source to another. What if all of those actions you create to manage your practice could be transferred to your billing? With a good foundation of a relationship database, the bells and whistles can really be more than just a loud noise.

Sharing with other programs is a must. Integrating with word processing programs, time and billing systems, accounting packages, personal devices and even the Internet are good examples. Integration should support our original need to share a main data source. *The Perfect Office* has that.

Who needs it? How do I get it? What does it cost? Such great questions. I'm glad you asked. Here's a couple of question I like to ask. What is it worth to your firm? What are you willing to invest? It costs money. It costs time. It takes research. And you can't really be competitive without it. Also, you can't get it on eBay.

This is not a fairy tale. All of the aforementioned and more is available and being used in offices down the street and around the world. Below are a few considerations on your quest for *The Perfect Office*.

You could start by asking around and using the old "how'd you do that?" I don't know about you, but I can't even find a good plumber in the Yellow Pages. I do get quite a few referrals so somebody's talking. Access your needs or find someone to help you.

Don't use band aids. They're sticky and they keep coming off. Take a realistic look at the big picture. In addition to the financial aspect, it is important to take a hard look at your staff. I met someone once who actually liked learning new stuff. Where would you like to be in a year? Five years? Technology changes continually, so plan on it.

Hire professionals. I know that everyone has a brother who has a son who has a friend that builds computers but come on; you're running a business here. Today's technology demands that the equipment and software work together. Hardware guys and software guys and gals are most often two different animals. You may need one of each. Make sure they can work together in your best interests. Remember it's still about sharing.



Size up who you're doing business with. The worst story I hear goes like this: *The guy who sold it to us was great. The guy who installed it was OK. The guy who trained us didn't know what he was doing. The guy who services us didn't show up.* Remember, sharing will work here too. Meet with everyone who will work on your account. Get referrals.

A cataclysmic event is when everything happens at once. Disaster will strike your office if you try and implement everything you eventually want done all at once. One good gage is to look at how much new training your staff can handle.

Speaking of training, you will need lots of training. A software management system that requires little or no training probably doesn't do much. It is super cool to ask "how will we be trained" before you ask "how much will it cost?"

It is a little known fact that software companies do not write manuals for you. They write them for something they call Users. I guess they think it works out great for them because if you are already using their software you don't really need a manual. Ask for a step-by-step procedure guide that is developed specifically for how you are going to use the software in your practice.

I didn't want a drill, I just wanted a hole. I see clients who spend too much or too little. Budgeting really does work. Figure out how much you are going to spend, and then use two-thirds of that amount for your project. You'll feel better when unforeseeable project costs over run by a third.

Have fun with technology. Yes, it can be fun! Your office is running efficiently, the work is more accurate, everyone seems to know what they're doing. Sometimes there are even neat gadgets involved. It's OK to smile.

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