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Clark Partington Implements Practice Management and Overhauls Network

By **William J. Dunaway**

Hurricanes have consistently devastated Northwest Florida and the surrounding areas, destroying offices, businesses, homes and more. Consequently, my firm, Clark, Partington, Hart, Larry, Bond & Stackhouse, learned some important lessons and turned its attention to technology that would protect clients' information and facilitate workflow at the same time. Clark, Partington is a full-service law firm serving business and individual clients throughout the Southeastern U.S. The firm has 34 lawyers and over 100 total employees, with two offices in Northwest Florida — one in Pensacola and one in Destin. As such, hurricanes are no strangers, but the destructive toll of Ivan in 2004 and its many successors made us realize we needed to better prepare our firm for the future, particularly in the area of technology.

Technology has always been an important part of our firm's operations, and we have invested in state-of-the-art software, such as Worldox for document management and Orion for financial management, to better serve our technologically savvy clients. The firm puts a high priority on being able to tackle clients' legal needs with a practice group composed of the right mix of attorneys and staff best able to effectively and efficiently handle the mat-

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ter. That means attorneys and paralegals must be able to work collaboratively, even if they are not geographically co-located. Such collaborative work, we decided, required a sophisticated practice management computer system. We knew what we needed, but we were not sure which system to purchase or how to implement such a system.

CHOOSING PRACTICE MANAGEMENT

Practice management software is a very crowded field, so there were many options. If possible, we were highly interested in having a complete front-end/back-end integrated system, rather than a piecemeal approach. Orion had a Practice Management (PM) module available, and since we already had its financial system in place, Orion's PM was definitely an appealing option. However, we wanted to take a hard look at the market and complete our due diligence before making any final decision.

There was a good deal of anxiety about this evaluation process, and we needed to build consensus in order to bring about the right outcome. A software purchase like this was going to be a major investment for our firm.

We looked at and evaluated some Web-based cloud computing products, but we did not feel those systems met our needs because we were not interested in disrupting our accounting/time and billing systems, but simply wanted a product that would integrate with Orion.

Other traditional case/matter management products we considered had feature

sets that seemed to be comparable with what Orion's PM offered. Again, because we have used Orion's finance software for many years and did not want to change the back-office accounting system, finding a practice management system that integrated with Orion and provided the feature set we needed was our primary goal. Since Orion's PM is built from the ground up to integrate with its Financial Management module, and because it offered the tools we needed, Orion became the clear choice.

In all, it took us about a year to make a decision, but in the final analysis, we decided to choose Orion's PM System for three main reasons. First, it did everything we needed and was built to integrate perfectly with the Orion Financial Management system we already had in place. Second, Orion's PM integrated with Worldox, which would make our users' lives easier because Worldox was already an integral part of their daily workflow. Finally, Orion's product synchronized with Exchange, which would allow our mobile attorneys to access Orion contacts and events on their smartphones.

Another issue that influenced our decision to go with Orion PM was that the company's technical support and customer service had always been very strong. Since we knew the practice management implementation might take a while, we were confident that Orion would stick with us and give us the assurances we needed to complete the process successfully.

We purchased Orion's PM System in

December 2009. The implementation of Orion PM with the Worldox interface and Exchange sync service options cost the firm approximately \$36,000, including the software, installation and training. This was a special discounted rate since we were already Orion customers. This cost represented a per-user investment of approximately \$500, which we calculated would result in a return on investment (ROI) within the first year, given the ability of each attorney to capture and record an additional 0.1 hours per week of billable time.

THE IMPLEMENTATION

Orion's technical team came to our offices to install the software. During the evaluation period, we had opted to outsource our IT from in-house to consultant-based. Orion worked with our outsourced IT providers to get the PM platform in place and running smoothly.

In preparation for the PM installation, we revamped our hardware and network software. Even if we had not upgraded to Orion PM, we would have had to upgrade our network to professional management capacity. We upgraded our servers and consolidated by implementing virtualized servers, which allowed us both redundancy and flexibility. We also expanded our electronic storage capacity, which has facilitated converting closed paper files to electronic files for long-term storage and ease of access.

When we installed Orion, we also upgraded our workstations to the specifications that Orion said would be optimal for the success of its product. We have 80 people using the PM system across our two offices, but with one database located in our Pensacola office. Users in the Destin office remotely access the database using Terminal Services.

In January 2010, we performed memory upgrades on all of our user workstations. In addition to Microsoft Office, the three main applications in use at the time were Worldox for document management, Orion for time entry and accounting, and

Outlook for e-mail, calendaring and contacts. We found that at least 2GB of RAM per machine provided optimal user capabilities, so we brought each computer up to that level.

In February, we upgraded to Worldox GX2 to take advantage of Orion PM's tight integration with Worldox. In March, we began to prepare for the Orion PM installation. Orion performed data upgrades for the financial module that we already had in place. In April, Orion came in to do the data conversion and upgraded us to PM — this was a critical time for Orion's help because it was the end of the first quarter, which created a major crunch for our accounting department and our transactional practice group. The data conversion went well. It was performed at night and over the weekend so our accounting department never missed an invoice or payment, and the transactional practice group never missed closing a deal.

TRAINING IN STAGES

In April, Orion also did its first training for our staff on PM's contact management features. Before the install, each lawyer had a separate Outlook address book so, as a firm, we had 34 separate contact lists to maintain. Orion PM now maintains one, firmwide, centrally accessible contact list, so if an address or phone number needs updating, it only needs to be updated once. Now our attorneys can much more easily share contacts, send out holiday cards and coordinate contacts across practice groups.

In May, Orion launched into phase two of our training, this time focusing on the Exchange Sync functions. Orion's Exchange Sync feature was incredibly helpful because it allowed event information entered in via smartphone (iPhone, Blackberry, Droid, etc.) to be populated in Orion and, further, those events entered in Orion could be synchronized to Outlook's calendar. Nothing is more important to our firm's attorneys than their contacts, calendar and task entries being remotely accessible.

Next, over the summer of 2010, we had small groups of paralegals, legal assistants and lawyers trained on the entire PM system. Some people were hesitant at first, which is to be expected when introducing a new technology. The younger lawyers and staff were more comfortable with the technology, while the older staffers needed more time to adjust and to begin to incorporate Orion's many features. The primary goal in the training process was to explain and demonstrate how the new features made familiar tasks easier. Orion's Exchange Sync was critically important to this implementation strategy.

BENEFITS

We are already benefiting and are on track to show a ROI ahead of schedule with Orion PM because we are capturing more time per-attorney per-month. As a Shareholder at the firm, I have noticed that the system has made me more efficient since it is easier to find contacts, phone numbers, e-mail addresses and documents related to my cases through Orion's expanded integration with Worldox. I am also better able to track the progress of files that I am not working on day-to-day, but are otherwise responsible for monitoring. Additionally, knowing that there are features offered by Orion PM not yet implemented means that we will continue to see increases in our firm's overall productivity as our knowledge and use of the software expands.

Now that we have Orion PM implemented and our network and workstations have been updated, we are in a much better position to weather the next hurricane or other disaster that comes our way. We have our critical firm data in a centralized database with a robust back-up management plan in place. Our productivity has increased, and the integrated front-end/back-office system that Orion has provided really benefits our firm's ability to serve its clients.