



Orion Law Management Systems

Case Study

Orion Law Management Systems

Version 4.3 Customer Solution

Orion is what integrated software is meant to be

CLARK PARTINGTON HART LARRY BOND & STACKHOUSE

Customer: Clark, Partington, Hart, Larry,
Bond & Stackhouse

Web site: www.cphlaw.com

Customer size: 34 lawyers, over
100 total employees

Location: Pensacola, FL
Destin, FL

Customer Profile

Clark, Partington, Hart, Larry, Bond & Stackhouse is a full service law firm serving the need of their business clients as well as successful families and individuals throughout the Southeastern US. The firm has 34 lawyers and over 100 total employees with two offices in Northwest Florida—one in Pensacola and one in Destin.

Software and Services

- Orion Financial Management
 - Time Management
 - Law Office Accounting
 - eBilling
 - Cost Recovery
- Orion Firm Management
 - Conflicts of Interest
 - Marketing
 - Orion Reporting System
 - Event Driven Alerts
- Orion Practice Management
 - Contact Management
 - E-mail Management
 - Document Assembly
 - Document Management
 - Case Management
 - Calendar/Docket Management
 - Client Intake Management

Technology

- Orion for Microsoft® Windows Server
- Pervasive.SQL Database Server
- Worldox GX2
- Microsoft® Exchange
- Microsoft® Outlook

Post-Hurricane Practice Management – Clark Partington’s Orion Practice Management Implementation and Network Overhaul

Business Problem

Hurricanes have consistently devastated Northwest Florida and the surrounding areas, destroying offices, homes and more. Through that experience, Clark, Partington, Hart, Larry, Bond & Stackhouse have learned some important lessons and have now turned their attention to technology that would protect their clients’ information and facilitate workflow at the same time.

Solution

Orion Practice Management 4.3

Practice management is a very crowded field of products so there with many options. The firm gave a hard look at the market. They were highly interested in having a complete front-end/back-end integrated system rather than a piecemeal approach. Orion’s Practice Management (PM) module was an appealing option since they currently had the Orion financial system in place. However, the firm wanted to complete their due diligence before making any final decision.

After comparing several products, Clark, Partington, Hart, Larry, Bond & Stackhouse chose Orion’s Practice Management system. There were three main reasons as to why they chose Orion. First, it was robust, it did everything the firm needed and was built to integrate perfectly with the Orion Financial Management they already had in place. Secondly, Orion’s Practice Management integrated with Worldox, which would make Clark, Partington, Hart, Larry, Bond & Stackhouse users’ lives easier because Worldox was already an integral part of their daily workflow. Finally, Orion’s product synchronized with Exchange which would allow the firm’s mobile attorneys to access their Orion contacts and events on their smartphones.

Another issue which influenced their decision to go with Orion PM was that Orion’s technical support and customer service had always been very strong. Since they knew the practice management implementation might take awhile, they were confident that Orion would stick with the firm and give them the assurances they needed to complete the process successfully.

“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 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.”

William J. Dunaway
Shareholder

The firm 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 they were already Orion customers. This cost represented a per user investment of approximately \$500, which the firm 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.

Implementation

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

In preparation for the PM installation, Clark, Partington, Hart, Bond, Larry & Stackhouse revamped their hardware and network software. Even if they had not upgraded to Orion PM, they would have had to upgrade their network to professional management capacity. The firm upgraded their servers and consolidated by implementing virtualized servers, which allowed them both redundancy and flexibility. They also expanded their electronic storage capacity, which has facilitated their converting closed paper files to electronic files for long-term storage and ease of access.

Once Orion was installed, the firm also upgraded their workstations to the specifications that Orion said would be optimal for the success of their product. The firm has 80 people using the PM system across their two offices, but with one database located in the Pensacola office. Users in the Destin office remotely access the database using Terminal Services.

In January 2010, the firm performed memory upgrades on all of their 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. They found that at least 2GB of RAM per machine provided optimal user capabilities, so they brought each computer up to that level.

In April, Orion also did its first training for the firm’s staff on PM’s contact management features. Before the install, each lawyer had a separate Outlook address book so, as a firm, there were 34 separate contact lists to maintain.

About Orion Law Management Systems

Founded in 1985, Orion Law Management Systems, Inc. offers fully integrated financial and practice management software for mid-sized law firms, including Time, Billing & Accounting Financial Suite and Practice, Contact & Case Management. Powerful firm management and reporting delivers rapid return on investment, increased profitability and reliable performance for mid-sized law firms nationwide.

Orion Law Management Systems, Inc. is headquartered at 1827 Powers Ferry Road, SE, Building 17 Atlanta, Georgia 30339.

Tell Us Your Story

To learn more about Orion's Practice Management system, please contact the sales department at 800.305.5867, info@orionlaw.com or <http://orionlaw.com/contact.htm>.

For additional information visit www.orionlaw.com.



Orion PM now maintains one, firm-wide, centrally accessible contact list, so if an address or phone number needs updating, it only needs to be updated once. Now the firm's 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 the firm's attorneys than their contacts, calendar and task entries being remotely accessible.

Over the summer of 2010, Clark, Partington, Hart, Larry, Bond & Stackhouse 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 you are 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. In the training process, the primary goal was to explain and demonstrate how the new features made familiar tasks easier. Orion's Exchange Sync was critically important to this implementation strategy.

The firm is already benefiting and is on track to show a ROI ahead of schedule with Orion PM because they are capturing more time per attorney per month. As a shareholder at the firm, William Dunaway has noticed that the system has made him 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. He is also better able to track the progress of files that he is 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 the firm will continue to see increases in the their overall productivity as their knowledge and use of the software expands.

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