



Orion Law Management Systems

Case Study

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Version 4.3 Customer Solution

Orion is what integrated software is meant to be



SKOLER, ABBOTT & PRESSER, P.C.
Exclusively Representing Management in Labor and Employment Law

Customer: Skoler, Abbott & Presser, P.C.

Web site: www.skoler-abbott.com

Customer size: Seven partners, one associate, one office manager and one bookkeeper

Location: Springfield, MA
 Worcester, MA
 Meriden, CT

Customer Profile

For over 40 years, Skoler, Abbott & Presser has exclusively practiced labor and employment law, representing the interests of management and employers. A boutique firm, Skoler, Abbott & Presser has a main office in Springfield, MA and two satellite offices—one in Worcester, Massachusetts and an additional office in Meriden, Connecticut. The firm currently consists of seven partners, one associate, one office manager and one bookkeeper.

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

From Dissonance to Consonance: Skoler, Abbott & Presser and Orion SFE

Business Problem

Skoler, Abbott & Presser, P.C. was operating on a variety of software programs. The main problem they had been experiencing was the inability of these programs to work in concert. None of these programs could communicate with each other and things were falling through the cracks: information, time, billable hours, etc. Each piece of information had to be entered multiple times into various applications, creating endless opportunities for errors and unduly wasting billable hours. They were in much need of integrated software.

In 2010, the firm's desire for integrated software coincided with an unavoidable and costly upgrade to their current software. They were using older versions of various software from the year 2005 and were essentially being forced to upgrade to a 2010 version, the cost of which really brought to the fore how they could improve our financial and practice management through an integrated software solution. Licenses were also maxing out before the firm was able to have access to the software and, therefore, the information they needed. This technology situation was a firm-wide a, knowledge-sharing problem, as well as a financial one.

It takes a great deal of time to make decisions about technology, especially for a firm this size, considering the financial investment it entails to choose a new software product. The firm wanted to make sure all of its employees would be on board with the ultimate decision and that the new software product would, indeed, improve their financial and practice management.

“The firm decided to schedule a demonstration of Orion. It’s one thing to sit with a piece of paper and a pen, listening to abstract instructions and taking notes; it’s an entirely other thing to have someone on the phone demonstrating software to you on your own desktop. Orion’s staff was excellent working with us and very patient as we asked questions. It didn’t take long before our office manager and then all the partners wanted to take a look.”

Jamie Martin
Bookkeeper

Solution

As the search began for the right software, Skoler, Abbott & Presser decided to leverage their connections in the greater legal community to find out what the best products were. The firm is a Worklaw[®] Network affiliate - a nationwide network of management labor and employment law firms (www.worklaw.com) as well as a founding firm. This national network consists of firms of a variety of sizes and experience, and so they began their search for a new software product by reaching out to other firms in this community. They received a variety of feedback and suggestions, including West’s ProLaw, LexisNexis’ Time Matters, and Orion SFE (Small Firm Edition).

Orion (www.orionlaw.com) stood out for the firm initially because they don’t outsource payroll—they handle it entirely in-house. Orion offered a payroll package, and that was very appealing to the firm. Also, Orion’s Small Firm Edition (SFE) had recently been released and its pricing was within the firm’s reach. Orion’s SFE provides the same powerful software as the main system, which is built for firms larger than Skoler, Abbott & Presser, but the pricing is affordable for smaller firms.

The firm made a decision to schedule a demonstration of Orion. The fact that an Orion staff member was demonstrating software on the firm’s employee desktops while speaking with them on the phone was very helpful. It didn’t take long before the firm’s office manager and all the partners wanted to take a look.

The decision came unanimously to purchase Orion SFE in early 2008. First, the firm waited a few months before installation so they could close the books on their previous fiscal year. In October of 2008, the Orion support staff came in for training and implemented a step-installation over a 6 month period, adding each aspect in the order the firm desired. The firm started with the installation of Orion’s financial system, then the file systems, then email. The installation of the financial system was the most complex; yet, Orion got it up and running in a quick two weeks. When the time came for the email install, it was able to be done by phone. The installation was smooth in all cases, and the firm was pleased with how the Orion staff worked with them.

“Orion SFE has changed how we, do everything. Every matter is now integrated: every email, every document, note and journal entry is linked to each case and accessible from anywhere at anytime. This makes a huge difference in our practice management. It helps attorneys access their files when they are unable to come into the office, and facilitates teamwork between attorneys and improved services to our clients. If a client urgently needs information regarding a case but is unable to reach a particular attorney, another lawyer can easily access complete, updated information about the client in Orion to be of assistance. Everybody wins.”

Jamie Martin
Bookkeeper

When Orion was installed, the firm had to upgrade their server, which they were due for anyway. They also purchased some additional training and implementation services and custom report/screen designs that increased the price somewhat. Orion SFE is defined by the number of Timekeepers (those that bill for their time) and is priced around \$1500 per Timekeeper. For the firm’s initial proposal, excluding optional software and services, the cost ran \$23,450.00, roughly \$1564.00 total for 15 Timekeepers.

This included:

- License for up to 15 Timekeepers/users
- Integrated Accounting
- All Practice Management features including Contact and Matter Relationships, Calendars, Tasks, Document Assembly, E-Mail Tracking and Journals
- Data Conversion from Timeslips and QuickBooks
- Training (both front and back office)

Approximately once a week, Skoler, Abbott & Presser’s attorneys gather together to review key aspects of their active case (i.e. Case Status Meeting) to produce “Case Status Reports.” Prior to Orion being implemented, the firm was collecting data from many sources (as described in the piece) including Timeslips and FileMaker, Outlook and from a network directory structure (to determine what key documents had been produced and when). Now with Orion, these reports can be completed in a fraction of the time the firm used to spend because all of the information is in one centralized system.

Orion completed a customization to help the firm further track data. They developed two tabs (combination of custom tables and fields setup to display within a “tab” type view) to track both general case information (e.g. Plaintiff, Defendant, Type of Matter, the Nature of the Case, Date of Filing, Alleged Employment Violation Date, Docket/Case Number and other various EEOC information) as well as case status info (e.g. Filing Status, Discovery Order, Type of Trial and Court/Jury/Settlement Information). This information, coupled with a list of key related contacts, a list of key case documents and docket dates is then assembled into one of two custom reports developed for the firm. Since these reports collect data from one source – Orion - the process takes seconds vs. hours spent collecting the data manually. In addition to the time-saving aspect, virtually anyone at the firm has access to both the information and the reports without having to ask for the report or wait until it is compiled manually.

“As bookkeeper for Skoler, Abbott & Presser, I am delighted with the streamlined accuracy and efficiency of the integrated financial management system—and everyone is delighted with more billable hours and more dollars coming to the firm. This kind of consonance is music to everyone’s ears.”

Jamie Martin
Bookkeeper

In addition to these “tabs” for the firm’s practice, Orion also implemented a more streamlined approach for Skoler’s marketing efforts. As with the employment law practice tabs, Orion also created custom tabs (again, a series of custom tables, fields and tab type view) to track the source of referral (i.e. where did they hear about the firm), what industries relate to their clients and prospective clients, the types of mailings (i.e. holiday cards, firm announcements, etc.) and/or alerts (i.e. change in law that may affect them) that may interest various firm related contacts (performed by exporting data from Orion directly to Constant Contact or any merge form such as a mailing label or letter) as well as the seminars that they wish to be invited to (and which they actually attended for historic purposes). Queries and Reports too were written that allow the firm to analyze these contacts.

Lastly, Orion also created various “standard” firm documents (merge forms) using Orion’s “Document Library”. These vary from a separate letterhead that merges information from a contact and related case to simple things like a fax coversheet, envelope and various mailing labels. Not only does each merge data from Orion into a Word or WordPerfect document, each is profiled into Orion’s document management system while allowing each timekeeper the ability to track and record their time related to producing the document.

The Orion Difference

Orion SFE has changed how the firm does everything. Every matter is now integrated: every email, every document, note and journal entry is linked to each case and accessible from anywhere at anytime. This makes a huge difference in the firm’s practice management. It helps attorneys access their files when they are unable to come into the office, and facilitates teamwork between attorneys and improved services to the firm’s clients. If a client urgently needs information regarding a case but is unable to reach a particular attorney, another lawyer can easily access complete, updated information about the client in Orion to be of assistance. Everybody wins.

Orion has also made a huge difference in the firm’s financial management. The integration features of Orion are incredible for time entry. An attorney can now take a phone call, make a journal entry, and bill all at the same time. This translates into more accurate billing because the attorneys are entering the necessary information faster and more efficiently in real time.

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 improves small issues such as check requests by instantly telling the firm who needs how much, what account to charge to, and when. They are also seeing a faster response time in the manner in which they open files and provide the information everyone needs. One specific example including Skoler, Abbott & Presser and how they deal with a lot of insurance companies who have extremely strict guidelines in their billing procedures, and sometimes the approvals from these companies come on a quarterly basis—that's a long time for fees to be sitting out there, especially if the approval is not given on the basis of some kind of inaccuracy or missed protocol. Orion has completely streamlined this process. The firm now does not have to go back and redo the invoices because there has been an erroneous over-billing or the time entries or codes have been entered incorrectly.

Orion SFE has made a major difference in the firm's financial and practice management. All of their files are now integrated which is something we wanted for a long time. This has improved communications between attorneys as well as with their clients. Matter tracking is easier. The savings are everywhere. There has been noticeable shrinkage in paper and supplies use because everything is electronic. Less paper and supply usage means reduced expenses, plus a definite green benefit as well.

This beneficial trend will only continue. Attorneys are increasingly mobile and increasingly need electronic access to their files. Orion can synchronize contact, task and calendar information to connect to Outlook on their smartphones—and the firm is looking into that for themselves for future implementation. Even the courts are beginning to want attorneys to file electronically. And it's all there with Orion.

Skoler, Abbott & Presser just finished their second fiscal year with Orion SFE financial management systems and are about a year and a half through their practice management implementation. Orion SFE has improved the billing performance of each individual attorney in the firm as well as teamwork firm-wide, not to mention their client communications. Bookkeeper for Skoler, Abbott & Presser, Jamie Martin, is delighted with the streamlined accuracy and efficiency of the integrated financial management system. They are also very happy with more billable hours and more dollars coming to the firm.