legalit insider

Orion Law Management Systems

Case Study Featured in Legal IT Insider - June 23, 2012

Customer: Shapiro, Sher, Guinot & Sandler P.A.

Web site: www.ShapiroSher.com

Customer size: 60 Users

Locations: Baltimore, MD & Washington, D.C.

Customer Profile

Shapiro Sher Guinot & Sandler is a law firm with offices in Baltimore and Washington, D.C. The firm's core departments—Bankruptcy & Financial Restructuring, Business Law, and Litigation—serve clients across all industry sectors, around the country and abroad. In 2011, the firm was named Maryland's "Top Medium-Sized Law Firm for Business and Transactions" by Super Lawyers, a division of Thomson Reuters. The firm and its attorneys are cited in several other publications devoted to listing outstanding providers of legal services, including Chambers USA and Best Lawyers in America

Software and Services

- Orion Financial Management
  - Time Management
  - Law Office Accounting
  - eBilling
  - Cost Recovery
- Orion Firm Management
  - Conflicts of Interest
  - Records Management
  - Orion Reporting System
  - A/R Collections Management
  - Client & Matter Intake Management

Technology

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

Shapiro, Sher, Guinot and Sandler Leaves the Cloud Behind and Implements Orion – Midsize Law Firm Finds the Right Fit

BY RENÉE LANE-KUNZ, ESQ., COO, SHAPIRO, SHER, GUINOT AND SANDLER P.A.

Recently recognized as a top mid-sized business law firm in Maryland by Chambers USA and Super Lawyers®, Shapiro, Sher, Guinot, and Sandler, P.A. knows what it takes to get to the top. With a primary office in Baltimore, Maryland and a satellite office in Washington, D.C., Shapiro Sher represents a variety of Fortune 100 corporations as well as other national and international clients. In April, the firm celebrated its 40th anniversary, a testimony to our attorneys' legal accomplishments and the firm's successful approach to the business of practicing law.

In order to remain at the forefront of the profession, the firm has maintained a constant focus on efficiencies, growth, and industry trends, including advances in legal technology. As both a practicing attorney and the Chief Operating Officer of the firm, I have a unique perspective – I use software that is designed for either legal or administrative support operations. Most recently, our team had the opportunity to evaluate several financial management and practice management software packages. Both the review process and the eventual implementation of a new system, Orion, taught us many lessons.

Accessing the Issues

Our business, like many others, relies on good technology. Creating a technologically sound business environment is necessary to operate most efficiently and cost effectively. However, not all technology is created equal. Finding the best fit for your firm is essential. At Shapiro Sher we began by reevaluating our financial management system, together with other software currently in place, and developed search criteria for a new system that would alleviate the difficulties that we were experiencing. We determined that our firm required a more intuitive and cost effective software platform that provided greater business support to our attorneys and allowed them to focus on the practice of law.

Looking to Get Out of the Cloud

Our former time, billing, and accounting system operated in an ASP hosted environment which, over the years, proved to be both cost and time inefficient. We experienced connectivity problems as well as delays in check processing when we were placed in the queue. Additionally, the system was not user-

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Renée Lane-Kunz, ESQ., COO, Shapiro, Sher, Guinot and Sandler P.A.

friendly and did not provide for any customization in report writing. These issues, coupled with the monthly fees, simply made being in the cloud less than ideal. While the software package may have been appropriate for a much larger firm, it did not suit our model.

Fortunately, we employ two full-time IT employees so bringing a system in-house has worked well for us. Orion's system places our IT staff in control where in the ASP environment, IT was at the mercy of an outsourced agent. Finding solutions to problems in the cloud proved to be more time consuming than maintaining our own server-based technology. This time, we specifically chose a more traditional, server-based system that would enable our IT staff to immediately troubleshoot issues, find solutions, reduce wasted time, and alleviate everyone's frustrations.

Financial Management Systems are Not Created Equal

We were one of several firms in our area that were in the process of switching financial management systems. Each firm, of course, was unique in its size, culture, and incumbent system. In comparing notes about each system, we quickly realized that "one size does not fit all." Our firm determined that it was most important for us to identify one system that would not only provide financial management support, but would also easily interact with other software programs allowing us to have one, fully- integrated system. Orion was our answer. Orion allowed us, for example, to continue to use Equitrac for cost recovery and offered options to add document management, records management, and practice management components. Further, while I, along with our Controller and IT Manager, made the final decision to go with Orion, it was satisfying to know that both an outside IT consultant and the sales representative from our incumbent system agreed with our choice. For our mid-sized firm, the efficiency and compatibility of this one unified system proved to be a success.

Implementation

The physical installation and implementation of Orion's financial management software took place over a one-week period in March 2012. Following the first few days of training, we were able to successfully complete most of the cursory tasks such as entering time, performing conflicts checks, printing pre-bills, and managing accounts payable. Our staff was impressed with the "hands-on" training they received and how intuitive the system proved to be. The installation was both smooth and quick, and we had exceptional representatives from Orion who walked us through the process and customized training sessions for targeted audiences. This approach allowed for training to be completed in stages and in the most time efficient manner. Our accounting and IT staffs worked with Orion trainers in interactive sessions to gain in-depth knowledge about how the system worked and the information it could provide, while attorneys and legal assistants required only abbreviated versions of the training that lasted an hour or so. In all cases, however, employees were able to begin using the program immediately following the training presentations,

which instilled confidence in and encouraged users of all levels to "play" with the software.

Orion's support team is also to be commended. Their responsive assistance has exceeded our initial expectations. Importantly, the Orion installation did not take place in a vacuum - we not only received on-site training and assistance, but also continued to receive follow-up calls from our sales representative who remained available to assist (although thankfully not needed!) throughout the transition. Even when a particularly unique issue arose in our data conversion, TEAM ORION rose to the challenge and with the help of its Programming staff was able to resolve the situation.

While we have only been operating the Orion system since early March 2012, we are enthusiastic about the initial feedback we have received from our employees about its easy maneuverability and its similar "look and feel" to Microsoft Office. It has piqued everyone's interest and we are looking forward to introducing additional Orion components to our overall package.

What's Next

With the assistance of Orion, we are now evaluating the next generation of document management systems for the firm. Once a document management system is selected, we will integrate that system with Orion's Practice Management System so that all documents, emails, dockets, scheduling, and client contacts may be managed in a fully integrated environment.

To summarize, Orion has fulfilled its promise to provide a cost-effective, integrated legal software system with many options to further customize our total package. While we spent time looking for the perfect fit, finding Orion was well worth the effort.

** Renée Lane-Kunz is the Chief Operating Officer of Shapiro Sher, Guinot & Sandler, as well as a practicing corporate attorney. As COO, she is responsible for the oversight and management of the Firm's accounting, human resources, information technology, facilities, and records departments. In her legal practice, she concentrates on employment law and human resources matters across a variety of industry sectors, as well as general corporate issues*

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
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To learn more about Orion's Financial, Firm or Practice Management systems, 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 Perceptive Software. Measurable Results.