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

By **Jamie Martin**

For over 40 years, Skoler, Abbott & Presser has exclusively practiced labor and employment law. A boutique firm, we have a main office in Springfield, MA, and two satellite offices — one in Worcester, MA, the other in Meriden, CT. I have been the firm's bookkeeper for 14 years and recently played a vital role in my firm's decision to purchase new financial and practice management software.

### THE PROBLEM: MULTIPLE SOFTWARE PROGRAMS

We had been operating a variety of software programs: Peachtree, QuickBooks, Filemaker, Microsoft Word and Outlook. A problem we were experiencing was the inability of these programs to work in concert. None of these programs could talk to each other and things were falling through the cracks: information, time, billable hours, you name it. It was dissonant. Each piece of information had to be entered multiple times into various applications, creating endless opportunities for errors. We wanted integrated software.

In 2007, our desire for integrated software coincided with unavoidable and costly upgrades. We were using older versions of various software, most of which were reaching end-of-life. The cost of upgrading these programs really brought to the fore how we could improve our financial and practice management through a compre-

hensive, integrated software solution. We were also maxing out licenses before everyone in the firm was able to have access to the software and, therefore, the information they needed. This technology situation was a firm-wide, knowledge-sharing problem as well as a financial one.

### THE SEARCH FOR AN INTEGRATED SOLUTION

It takes a lot of time to make decisions about technology, considering the financial investment involved in choosing a new software product. We wanted to make sure that everyone in the firm would be on board with the ultimate decision and that the new software product would, indeed, improve our financial and practice management.

As we began our search for the right software, we decided to leverage our connections in the greater legal community to find out about the best products. Skoler, Abbott is an affiliate and founding firm of the Worklaw® Network ([www.worklaw.com](http://www.worklaw.com)) — a nationwide network of management, labor and employment law firms consisting of firms of a variety of sizes and experience — so we began our search for a new software product by reaching out to this community. We received a variety of feedback and suggestions, including West's ProLaw, LexisNexis' Time Matters, and Orion SFE (Small Firm Edition).

Orion ([www.orionlaw.com](http://www.orionlaw.com)) stood out for us initially because we don't outsource payroll, so the fact that Orion offered a payroll package was very appealing to our firm. Also, Orion SFE had recently been released and its pricing was within our firm's reach. SFE provides the same software as the main system, which is built for firms larger than ours, but the pricing is affordable for smaller firms.

We decided to schedule a demonstration of Orion, and the product looked great. 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 the partners wanted to take a look.

The decision came unanimously to purchase Orion SFE. First, we waited a few months before installation so that we could close the books on our previous fiscal year. Later, the Orion support staff came in for training and implemented a step-installation over a six-month period, adding each aspect in the order we desired. We started with the installation of Orion's financial system, then the file systems, then e-mail. The installation of the financial system was the most complex, yet Orion got it up and running in two weeks. By the time we came to the e-mail install, we were able to do that by phone. The installation was smooth in all cases, and we were pleased with how the Orion staff worked with us.

When we installed Orion, we did have to upgrade our server, which it was due for anyway. We 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 \$1,500 per Timekeeper. For our firm's initial proposal, excluding optional software and services, the cost ran \$23,450.00; roughly \$1,564.00 total for 15 Timekeepers.

This included:

- License for up to 15 Timekeepers/users;
- Integrated Accounting;
- All Practice Management features, including Contact and Matter Rela-

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**Jamie Martin** has served as the bookkeeper for Skoler, Abbott & Presser P.C. since 1997 and is a member of the American Institute for Professional Bookkeepers. For more information about the firm, please visit [www.skoler-abbott.com](http://www.skoler-abbott.com).

tionships, Calendars, Tasks, Document Assembly, E-Mail Tracking and Journals;

- Data Conversion from Timeslips and QuickBooks; and
- Training (both front and back office).

## **CUSTOMIZATIONS TO IMPROVE WORKFLOW**

Approximately once a week, our attorneys gather together to review key aspects of their active cases and produce "Case Status Reports." Prior to Orion being implemented, the firm was collecting data from many sources, including Timeslips, FileMaker, Outlook and from a network directory structure to determine what key documents had been produced, and when. With Orion, these reports can be completed in a fraction of the time we used to spend because all of the information is in a single, centralized system.

Orion completed a customization to help us further track data. It 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 versus the hours it would formerly take to collect the data manually. In addition to the timesaving 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.

In addition to these tabs for our firm's practice, Orion also implemented a more streamlined approach for Skoler, Abbott's marketing efforts. As with the employment law practice tabs, Orion also created custom tabs to track the source of referral, what industries relate to clients and prospective clients, the types of mailings

and/or alerts that may interest various firm-related contacts, as well as the seminars to which they wish to be invited and those they actually attended. Queries and Reports were also written that allow the firm to analyze these contacts.

Last, Orion 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.

## **IMPROVEMENTS RESULTING FROM THE INSTALL**

Orion SFE has changed how we do *everything*. Every matter is now integrated: every e-mail, 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 improves 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.

Orion has also had a major impact on our 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.

Orion has also improved small issues, such as check requests by instantly telling us who needs how much, what account to charge, and when. We're also seeing a faster response time in the manner in which we open files and provide the information everyone needs. For example, we deal with a lot of insurance companies that have extremely strict guidelines

in their billing procedures, and sometimes the approvals from these companies come on a quarterly basis, which is 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 for me. I don't 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.

## **CONCLUSION**

Orion SFE has made a significant difference in the firm's financial and practice management. We just finished our second fiscal year with Orion SFE financial management systems and are about a year-and-a-half through our practice management implementation. Orion SFE has improved the billing performance of each individual attorney in the firm as well as teamwork firmwide, not to mention our client communications. As Skoler, Abbott's bookkeeper, 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.