



Capture Billable Hours with Knowledge Management

CRM, DM, CM – how “M” Systems can Make More Money for the Firm

by Ray Deck, Element55

Law firms have deployed document management, case management, client relationship management and other systems to capture and distribute the knowledge of members and associates. These systems have been major investments, both in the technology itself, and in the setup and training to make it part of the firm.

The direct value of these systems is usually in the reporting – the aggregation and presentation of data from the various attorneys on multiple activities to give insight into the business, or retrieving relevant archived information for a present need.

The Challenge: Quality Front-end Data

The key to realizing this value is getting the attorney to provide data to the system. This is actually two challenges: the attorney (or in some cases an assistant) must input data in the first place, and the attorney must populate the fields in the system with useful information that will help the later retrieval or reporting.

In most cases, the value is realized by a different attorney from the one who would have input the original data, or by the same attorney at a much later date. In either event, there can be a disconnect between the attorney providing data at the front end, and the beneficiary at the other end.

Some firms manage this disconnect through enforcing policies. For example, many firms have a requirement that contacts be recorded in the centralized customer relationship management system. Another common situation is that the document management system is integrated into the very act of opening and saving a document in a word processor, such that providing data is just part of the work flow.

But neither example enforces the quality of data, and while it might provide a negative incentive for not following the policy, attorneys respond even better to positive incentives – answering the question “how is providing this information going to help me today?”

The Solution: Integration with the Timesheet

Automatic time capture means the computer does the work of filling out the attorney’s timesheet based on activities conducted throughout the course of the day:

Phone Calls: .8 hours for “*Call to (617) 423-0692*”

Emails: .3 hours for “*Read email from jdoe@abcinc.com Re: The Agreement*”

Documents: 1.5 hours for “*Revise New Agreement.doc*”

Automatic time capture will integrate with the knowledge management systems to provide better narrative and descriptive data to activity-based time entries.

For example, a phone call might come in from the phone system as “(617) 423-0692”, but by cross-referencing with the customer relationship management system, that number can be matched with a name and company, becoming “Ray Deck (Element55, Inc.)”

When the CRM system contains a link to match the particular individual with a client-matter, the automatic time capture system should capture and present this as well, turning the example above into:

.8 hours for “*Call to Ray Deck (Element55, Inc.)*” assigned to client-matter 99999-2234

There are other examples as well:

Emails: Addresses can be translated into contacts and potentially client-matters just as with phone calls, e.g.: jdoe@abcinc.com becomes “John Doe (ABC Inc.) assigned to client-matter 04512-0001.

Documents: When a document is registered in the DMS, time spent on it can be ascribed not only to the particular document, but also the client-matter in the document's profile. So the time spent working on the "New Agreement" above can be automatically assigned to client-matter 04512-0004.

Immediate Benefit to the Firm and Attorney

The attorneys realize this value at the front end – immediately after filling out a profile in a knowledge management system, they can reap a benefit in the form of a more completely filled out timesheet. Provide the contact information for a given individual once, and the five electronic communications (phone and email) in the following week will all be ascribed to the proper client matter.

The attorney is also rewarded for the quality of data they put in. One firm in our experience had an issue where some attorneys would respond to the enforced use of a document management system by assigning almost all documents to the "firm-general" client-matter in the profile.

With automatic time capture, taking the extra ten seconds to attribute the time to the proper client-matter is reaped immediately in appropriate assignment of that time for every time he/she works on that document from then on.

The firm realizes a similar immediate benefit in the form of additional hours captured. The more the timesheet is filled out with useful context, the less the attorney has to ask "what was I doing last week" or "and what client was that for?"

Implementation Considerations

The tie to the timesheet should involve a "read-only" relationship with the knowledge management systems, tapping their databases either through client-side API or server-side database query. This integration should be invisible to the user, creating value with zero clicks.

From a technical perspective, there should be no change necessary in the knowledge management systems – the time capture system should accommodate the existing structures, so as to minimize the complexity of the implementation, and account for potential future changes in the mix of KM systems (e.g. switching document management systems after a merger).

An integrated time capture system should accommodate these needs seamlessly, requiring input on the back-end of what version and type of KM systems are deployed, and allowing changes on the fly, so that all the potential time is captured with zero clicks on the part of the user, and minimal input required by information managers.

Time Capture and KM: Win-Win

These benefits mean that both the attorney and the firm realize a major, quantifiable return on their investments in knowledge management in a short timeframe- more convenience for the attorney, and more billable hours for the firm.

In the longer run, the the attorney and the firm both benefit from the reporting and retrieval available from better quantity and quality of data in the knowledge management systems on account of the short-term positive incentives. 📄

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