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A MAGAZINE FOR THE LITIGATION SUPPORT PROFESSIONAL

BEST PRACTICES

By Joseph C. Scott

After careful consideration and analysis, your law firm has finally settled on accounting, document and project management systems. But until you determine where you stand on court calendaring, you aren't quite done considering all of your litigation support tools. Are you still counting days with fingers and toes? Using a non-legal,

lawyers, paralegals, assistants and support staff spend untold hours finding, calculating and double-checking court deadlines. They also put themselves through considerable stress--when tracking dates and entering them manually, there is always the concern that a deadline will be calculated incorrectly, or a local jurisdiction holiday won't be factored into the equation.

While it may seem like an intimidating job to review different calendaring systems and get all the major players at

should consider these seven criteria and circumstances to find the best fit. Taking these factors into account will make the process smoother, more productive and provide greater benefits for your firm, your staff and your clients.

1. Determine and identify the person(s) responsible for calendaring.

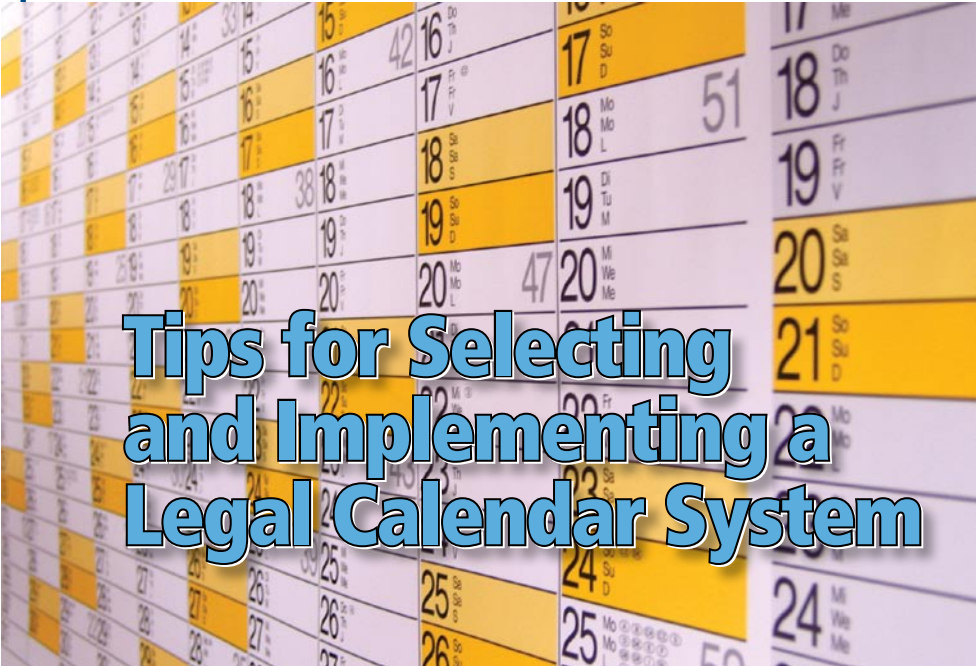
At the smallest firms, attorneys may track their own calendar dates; at the other end of the spectrum, the huge, national firms have entire departments dedicated to court docketing. Look carefully at the parameters of the calendaring systems you consider to see which one will work best for your staffing levels. Some systems have been designed for calendaring professionals with extensive training and background in the area. At firms where attorneys, paralegals or other legal staff track dates, a simpler program will probably be the answer.

2. 100% Compliance.

It doesn't matter how sophisticated your calendar system is if everyone isn't using it. Only 100% compliance will result in a successful implementation. Determine that everyone is on board with the calendaring procedures that will be in place and circulated to maximize efficiency. Identifying a highly placed advocate at the firm can help smooth this process considerably.

3. Quality and Experience Matter.

Make sure the vendor/company you choose is truly in the "rules business" and not just providing timelines. A rules-based program should cover a range of jurisdictions. Also check to see if the vendor's IT staff includes qualified attorneys and legal calendaring professionals who



Tips for Selecting and Implementing a Legal Calendar System

non-integrated generic calendaring program? Making numerous phone calls to courthouses in various jurisdictions to track down deadlines and court rules? Constantly e-mailing changes in dates to all the attorneys and their assistants involved in a given litigation?

Rules-based calendaring systems have become an important part of today's legal practice. Without an effective, efficient, legal-specific calendaring program,

the firm on board, the costs for failing to do so can be very high; in the worst-case scenario, a missed deadline can result in a case being tossed out of court, with your now-former client's malpractice lawsuit following shortly thereafter.

Calendaring systems are as unique as law firms, and no one single calendar will work for every firm. Before investing time, money and resources in a court calendaring program, your firm

update the rules regularly and can provide real-time technical support when you need it.

4. Check for Customization.

Every firm has its own internal systems, procedures, culture and language. It's important that your calendar program can be adapted to work your way, with your other software programs and in a way your attorneys will accept.

5. Training is Key.

Intuitiveness and ease of use may be important considerations at your firm, but you won't be able to get everything out of a court calendaring system by reading a manual. In order to make best use of the system you choose, product training is important. Be sure to inquire about the level of training the vendor provides to ensure fast, successful installation and use.

6. Investigate Features.

Thoroughly consider the different

features that various systems offer, and decide which are most important at your firm. Does the program perform automatic updates when rules/dates are changed by the court? Is the program sensitive to audit trails and passwords? Does the system provide a variety of reports, and will these reports integrate with other programs? Does the program allow your firm to bill costs directly back to clients?

7. Off-Site/Back-Up Capabilities.

Attorneys and legal support staff are on the go today. Make sure your calendaring system can be accessed remotely when a staffer is traveling or working from home. In addition, make sure your system can perform "dual calendaring," which is the ability to back-up the calendar system to another location for risk management purposes. In case a fire or a natural disaster hits your law firm offices, dual calendaring will allow you to access key information and

dates, making it much easier to get back up to speed and ensuring that you can take care of your client's cases even in the most difficult of circumstances.

The last thing litigators want to worry about is facing litigation from (former) clients. With a thorough, effective calendaring system, the worries over malpractice cases shrink considerably—along with the hours spent on the grueling work of tracking down court dates over the phone or online, then tediously checking and rechecking to ensure that those dates have been calculated and input correctly. Finding the appropriate calendaring system for your firm is a boon to attorneys, staff and clients alike.

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