

LEGAL MANAGEMENT

JULY/AUGUST 2008

VOLUME 27 | NUMBER 4

BESTPRACTICES

Save the Date

User Group Meetings Promote Best Practices for Court Docketing

BY JOSEPH C. SCOTT, J.D.

For legal administrators who manage their law firms' court docketing systems, the process can be challenging. With all of the demands on their time, paralegals often struggle to stay on top of the latest tools, techniques, and best practices for court calendaring. While they may be familiar with the basic features of their firms' docketing systems, many have the nagging sense they are not making use of all the program's features or may be missing out on shortcuts that could streamline the process.

Recognizing that shared sense, law firms have started to come together to share tips and best practices on how to better utilize their court calendaring systems. For example, in cities across the United States, law firm representatives are now meeting regularly in user group events to talk about the overall challenges they face in managing their court-rules based calendars, discuss the unique features and benefits of programs such as CompuLaw Vision™ and the CompuLaw Vision Web Portal™, and share ideas on how to ease the docketing workflow process.

Rather than being driven by the technology company, this initiative is one that paralegals and those in the docketing areas at law firms are developing and sponsoring on their own. Besides regularly scheduled face-to-face meetings, virtual and phone-in user groups are often available to those who cannot travel to certain events.

So far, firms that have sponsored user group meetings include Kilpatrick Stockton LLP in Atlanta, Pillsbury Winthrop Shaw Pittman LLP in San Francisco, DLA Piper US LLP in Chicago, and Latham & Watkins LLP in Los Angeles.



Users have their say when it comes to best practices in court calendaring.



Law firm representatives are now meeting regularly in user group events to talk about the overall challenges they face in managing their court-rules based calendars ... and share ideas on how to ease the docketing workflow process.

"I feel that it was very successful," said Penny Clarke, J.D., Litigation Docketing Manager at Kilpatrick Stockton, of the meeting her firm helped organize last fall. "We definitely want to keep this going, because there is a need for this type of support in our area," added Clarke, whose full-service law firm has more than 500 attorneys in nine offices throughout the eastern United States and Europe. Clarke manages litigation docketing for all of Kilpatrick Stockton's domestic offices.

For Bill Makinney, Firmwide Calendar Docket Manager at Pillsbury, the user group meetings have offered valuable give and take, and both clients and CompuLaw learn from these exchanges.

"It really benefits both sides, because we know we are going to learn lessons that will help us in the long run, and CompuLaw is gaining the benefit of our feedback and new ideas. And there is nothing more valuable than receiving new ideas from users," said Makinney, who oversees the court calendaring system for the 800-plus attorney firm with 14 offices worldwide. "Many of the upgrades to CompuLaw products have come from user feedback, because we are the practitioners who truly know how the product acts in law firm environments," he said. "In these user group meetings, we are able to bring up issues that may become part of development lists and that might actually become part of future product releases. ... It's very gratifying."

LUNCH, PRESENTATIONS, AND Q&A

In the San Francisco area, user group meetings are held quarterly, with about 30 live attendees and several who phone in, according to Makinney, who organizes the events. The meetings are often done over the lunch hour in a brown-bag fashion, to make them more accessible to those who do not have time for lengthy sessions away from the office.

At a typical meeting, CompuLaw representatives offer an overview of a particular aspect of the system and discuss new technical developments, such as a specific new rule change, how to synchronize to Microsoft Outlook®, or how best to utilize the CompuLaw Web Portal™ aspect. The company may also provide a preview of new developments.

"A lot of our attendees are fairly sophisticated users, so they don't need to have a training representative come in to show them new features," said Makinney. "They also have a chance to preview new functions at our user group events."

A Q&A session is held after each meeting, during which participants can learn more about specific aspects of docketing, and where they can discuss best practices with each other.

"We had a lot of questions on how to achieve certain results, what's the best way to accomplish another function, and what other firms are doing to improve best practices," Clarke recalled. "A partner and an associate from Sutherland Asbill & Brennan LLP provided insight from the attorney side. The partner wanted to find out from us how she could explain to the administration in her firm that not just anyone can do this job. You can't just grab a secretary and tell him or her to track the calendar, because this job requires much more than basic data entry. There is a level of expertise that comes with docketing, and that was a major topic at the meeting."

The first user group meeting in Atlanta was so successful that Clarke and others plan to make it a quarterly event. Clarke already has topics in mind that she would like to explore at future get-togethers. "I hope to gather insight on how others are setting up and developing their departments, to find out information on which components of CompuLaw others are using, what kind of support they have, and what kind of staff they have," said Clarke, who joined her current firm last year. "I'd also like to share ideas on processes, ways to change things, ways to internally market the product and get others on board – because people are always nervous when there's any new technology to learn."



GETTING STARTED

The San Francisco user group meetings came about through conversations between Makinney and CompuLaw representatives.

"Because both sides were mutually receptive to the idea of user group events in our area, we just jumped on it immediately," he said.

Once he decided to begin coordinating the first meeting, Makinney began by contacting local users of CompuLaw. He knew some of the invitees, and CompuLaw provided contact information for other clients in the area.

"We're a pretty tight-knit group here in San Francisco," he said. "We have a San Francisco Docket Association that I chair, and it's an organization that is comprised of most of the large law firms in Northern California."

Since the first meeting, the CompuLaw user group has met approximately eight times. The list of users has grown to about 60 members, including people from law firms throughout the West Coast who participate via telephone calls. Besides the quarterly meetings, users have formed their own informal listserv, where members can also ask questions and share insights and ideas. That list is independent of CompuLaw, and it is limited to users, according to Makinney, who added that, "People can be very candid, and we do a lot of brainstorming in that respect."

TAKING THE NEXT STEP

For both Makinney and Clarke, the user group meetings represent another step in their firms' use of CompuLaw. With hundreds of lawyers in multiple offices around the world, each considers docketing a pivotal challenge.

Makinney's firm, Pillsbury, has been using CompuLaw for about seven years. Before that, the firm was using a "clunky" home-grown docketing system that Makinney had devised. That system functioned well enough while Pillsbury was relatively smaller and concentrated most of its litigation practice in California. But as the firm expanded, Makinney knew attorneys, paralegals, and other staff needed a more comprehensive docketing and rules-based calendaring system.

"In the days when we were more or less a regional California law firm, we were able to support our litigation practice by

maintaining and using the basic resources that are available, such as the California Rules of Court, codes of California and Federal procedure and other resources," he said. "But when your firm begins to practice in other states, it becomes completely overwhelming for staff to be well-versed in 49 more states, with multiple venues within those 49 states to keep up with."

After looking at various docketing systems, Makinney said, Pillsbury decided to implement CompuLaw Vision firmwide, noting that "we wanted a system that would support all of our offices for a wide-area network."

The firm has been able to implement and adapt CompuLaw Vision even as it has expanded, including a merger between Pillsbury Winthrop LLP and Shaw Pittman LLP in April 2005, which formed the current firm. Now, Pillsbury is able to manage all of its calendaring needs from two centralized offices, in New York and San Francisco.

Unlike Pillsbury, which has years of experience with CompuLaw, Kilpatrick Stockton rolled out the calendaring program last fall and is still implementing it throughout all of its offices. Fortunately, Clarke noted, she had experience with CompuLaw Vision at a previous job, and she helped the firm to acknowledge what it lacked by not having a centralized calendaring system.

Ultimately, though they may be at different stages when it comes to implementing a firmwide calendaring system, both Clarke and Makinney believe they benefit immensely from the user group meetings.

"Every time I return from a user group meeting, I'll receive a number of e-mails from people, saying 'Wow, that was a really interesting point,' or 'Put that on the agenda for next time,'" he said. "People are still thinking about our discussions and look forward to the next one, and I think that's a really powerful message." *

about the author

Joseph C. Scott, J.D., is an attorney and Vice President/General Manager of CompuLaw, LLC, and Deadlines On Demand, LLC, providers of legal rules-based calendaring software and services for law firms. Contact him at jscott@compulaw.com.