

LEGAL MANAGEMENT



CASESTUDY

carefree court calendaring

The docketing department at Sheppard Mullin Richter & Hampton LLP recently overhauled its calendaring processes – improving efficiencies, minimizing the risk of malpractice lawsuits and putting up-to-the-minute information about the court calendar on the desktops of every attorney and staff member at the AmLaw 100 firm.

BY DOROTHEA FORD-HOWARD

With more than 500 attorneys spread across 11 offices in the United States and China, managing the court calendar is a critical – and challenging – task for Sheppard Mullin Richter & Hampton LLP.

Several years ago, we realized the court calendaring system we were using was inadequate for a multinational firm involved in high-stakes litigation for a national and international client base. The firm needed a high-tech solution that would allow us to streamline our calendaring process, simplify docketing training for our clerks and further our goal of eventually going completely paperless with the court calendar.

In 2006, we found a solution for our court calendaring needs in CompuLaw Vision™. With the introduction of Vision, our centralized docketing staff was able to substantially boost efficiencies and minimize potential calendaring errors that could lead to costly and embarrassing malpractice lawsuits.

But even as we were able to improve the process of creating, updating and communicating the court calendar, we found ourselves spending a great deal of time responding to attorneys and staff who called and e-mailed with questions about the status of various matters.

These calls and e-mails for support took time away from our other calendar-related tasks. We needed to allow attorneys and staff to access the information they required in an independent way, without being able to change any of the data.

We took our concerns to CompuLaw, which then introduced us to its Vision Web Portal™. Last year, we rolled out the Web Portal firmwide to every desktop. Through the Web Portal, lawyers, paralegals and administrative support staff can easily access information about their matters and court dates. This has significantly freed up our docketing staff to focus on creating a firmwide court calendar that is always updated, available and accurate.

ROLLING OUT A NEW SYSTEM

We started looking for a new court calendaring system several years ago. In 2003 and 2004, we opened our first two offices outside the state of California, and we realized we had to change the way we managed our calendaring process. In the early 1990s, we had used CompuLaw products for our calendaring needs, but more recently we had adopted another program. By 2006, it became apparent that we needed a more robust calendaring program that could keep pace with the growing size of our firm and the way our attorneys work.

We identified several critical features for any new docketing program. These included quality control, a comprehensive set of court rules, the ability to customize, growth potential and adaptability. After doing our research, CompuLaw Vision stood out as the only program we thought could provide us with all of these must-have components.

Vision offers a legal-specific calendaring program with thorough multi-jurisdictional court rules-based databases for every state and many practice areas. It offers automatic and accurate date calculations, and when rules change, as they frequently do, the program adjusts the dates automatically, without any required research on our end. Vision was also able to integrate seamlessly with our existing technologies, such as Microsoft Outlook®. We were also impressed with its ability to adapt and grow with our firm.

We also considered the ease of implementation, the degree of customization and what type of

training and support we could expect. Impressed with what we saw, we began using Vision in 2006. With CompuLaw's support, we were able to quickly train docketing department staff on the new system.

Throughout the three years we have worked with CompuLaw, its staff members have been very responsive. They communicate with us effectively and offer suggestions that make our processes more efficient. Most importantly, they listen to us and take our suggestions seriously. We have worked with CompuLaw designers to customize the docketing program for our specific needs, based on input from our attorneys and staff.

The workload and type of work the docketing department does have changed significantly. Our calendaring process is far more automated now, which has saved us considerable time and significantly reduced the chance of errors. I feel confident knowing that CompuLaw has a team of qualified attorneys researching and interpreting our court rules. And, because we no longer have to calculate court dates manually and figure the rules for so many different jurisdictions, we can offer greater services to our attorneys and staff without having to hire more people for the docketing department.

While the actual calendaring took much less time with Vision, we still needed to respond to daily calls and e-mails from staff and attorneys about the status of new and ongoing matters. This took time away from calendaring new items and overseeing updates. Fortunately, CompuLaw was able to help us with that problem through its Web Portal, which allows 24/7 access to all Vision data securely over the Internet.

We went live with the Web Portal in 2008, rolling it out on every desktop throughout the firm. Our attorneys and staff can now look at their court calendars through their Web browsers at any time, and if they have a question about a matter or court rule, they no longer need to contact our docketing department to get this information.

The Web Portal has reduced the number of support calls and e-mails we receive by almost 90 percent – it has been *that* important to our docketing department. Now, we can focus on calendaring, without having to interrupt our work to take lengthy support calls, look up individual

documents to determine receipt, print out calendars and send dockets electronically.

THE CALENDARING PROCESS

We oversee all calendaring through a centralized docketing department at Sheppard Mullin Richter & Hampton LLP's headquarters in Los Angeles. My department serves our eight California offices, our New York office and our Washington, D.C., office. (We also have an office in Shanghai, China.)

Every time a new matter comes in, it first goes to the department that oversees conflicts, and it is assigned a permanent matter number. Then, attorneys and staff forward all necessary information to my department, which manages the docketing. Once we receive a matter to docket, my staff processes the information, applies the court rules, does any necessary background research, checks for updates and ensures everything is accurate. We apply an internal checks-and-balances system to ensure that no errors have occurred. Then, Vision interacts with our Microsoft Outlook program so attorneys and staff can automatically update their appointments.

After this process, we send the information to the attorney for sign-off. The attorney can be assured at that point that the matter is in the database.

Until we went live with Web Portal, we used electronic timekeeper reports. Now, assistants can go online to view and print reports. Attorneys also can interact directly with the calendar and view/interpret court rules.

Weaknesses in the court calendaring process can create major malpractice vulnerabilities for many law firms. Thus, the Vision program is considered essential at Sheppard Mullin Richter & Hampton LLP, decreasing the firm's risk of malpractice due to calendar-related errors. CompuLaw Vision and the Vision Web Portal help the firm to stay on track and to accomplish long-term goals accurately and efficiently. ✱

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