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Streamlining Law Firm Workflow to Improve Efficiency

Law firm administrative staff often spends a great deal of time handling attorney requests and assignments for specialized tasks, such as document production, travel requests and booking conference rooms.

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Yet many firms don't have a consistent approach to managing this type of work, instead using things such as IT help desk ticketing systems, old-fashioned paper forms and email, or a combination of such processes.

While these approaches may provide for task delegation on a high level, they are largely inefficient, not trackable, and prone to error and ambiguity. They also fail to utilize staff talents for higher-value services. These solutions present many pitfalls, yet task assignment, delegation and prioritization are oftentimes overlooked as areas for process improvement within a law firm.

There are many ways that legal management professionals can help their firms work toward implementing standardized, efficient workflows to accomplish important tasks. With the right workflow management tools, firms can quantify the amount of work back-office staff are doing and ensure critical information is provided on the front end so tasks may be accomplished smoothly and effectively.

Once information is properly managed, firms can explore options, such as centralizing tasks and reassigning staff to help those who are overloaded.

THREE COMMON WORKFLOW OPTIONS AND THEIR LIMITATIONS

With no intuitive, affordable solutions, many firms have turned to one of three options or a combination: IT help desk ticketing systems, email and paper forms.

1. IT Help Desk Ticketing Systems

IT ticketing systems may seem to offer advantages to law firms starved for workflow systems. These systems come with a built-in workflow process that includes ticketing capabilities. They also allow for intelligence gathering with an electronic tracking system.

However, there are many drawbacks to using IT ticketing systems outside the IT department to manage specialized tasks.

These were not created as interdepartmental routing systems to allow the right people to receive the tasks and information they need. They also lack any way to quantify work, so firms can't determine which tasks are frequently requested and the resources necessary to complete them.

Most importantly, they aren't very user-friendly or intuitive. That means that lawyers who employ these systems have no easy way to track the progress of specific tasks. As a result, they often follow up with frequent emails and phone calls, which defeats the purpose of having a system in the first place.

2. Email
Law firm staff and lawyers live in Outlook, but it is not designed as a workflow tool. While it is simple to attach documents and send instructions in an email, this approach to handling tasks is difficult to manage and measure.

Free-form text for instructions can be the most ambiguous — the sender understands what he or she wants, but the request may not make any sense to the recipient. This forces staff to stop what they are doing and contact the attorney for clarification. The lawyer then responds with more information, but it rarely stops there. A cavalcade of emails may follow, with multiple CCs and additional information — all wasting precious time and resources.

3. Paper Forms
Even in this highly digital age, many law firms still use the hard copy approach to request and manage tasks. This extremely manual process eliminates the ability to share work among offices or with an off-site center or service provider. There is also no built-in way to quantify the work to determine how long a job will take or how many times a similar task is performed every day or week. This analog approach also makes sharing work among staff cumbersome and difficult.

KEY FEATURES IN A WORKFLOW SYSTEM

Fortunately, there are options. By bypassing disparate approaches and opting for a singular system created specifically to manage workflow, law firms can measure and manage basic tasks efficiently and professionally. Once information is properly managed, firms can explore options, such as centralizing tasks and reassigning staff to help those who are overloaded.

Firms can go one step further to specialize staff members to do tasks they are good at for increased efficiency. It also minimizes the need for staff to continually check back with attorneys to make sure they have all the information they need when a request is submitted.

To achieve all these goals, firms should look for several key features in a workflow system. This includes the ability to **configure** the system based on how the firm manages work. A configurable system is flexible enough to address each firm's unique needs and culture.

Additionally, the system should be **flexible** enough to allow virtually any task to be managed within the workflow, which will maximize the value of the investment and the impact it can make. It should also allow the firm to **quantify** information, so the firm can gain insight into how many requests of different types are submitted, who is managing those requests and the total hours associated with them. Finally, it should allow for easy **prioritization**, so that staff members can see at a glance which tasks need to be completed immediately and which ones are less urgent.

Every law firm faces different workflow challenges and has different processes for handling countless administrative tasks. With a flexible, thorough workflow management system, the time and effort required for many of these tedious, repetitive and inefficient tasks can be minimized, and the level of service provided to internal and external clients raised significantly.

ABOUT THE AUTHOR

Eric Wangler is President of the North American business unit for BigHand. He has more than 15 years of experience in the legal industry, including time at Ricoh. Since joining BigHand, Wangler has grown the North American business and the BigHand customer base significantly.

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