



## Lessons from Leaders in Online Legal Services

**KENTUCKY IS FAMOUS FOR A LOT OF THINGS: HORSE COUNTRY, BLUEGRASS, AND OF COURSE, THE DERBY. BUT E-LAWYERING?** Apparently so. Based in Louisville, Kentucky, Hargrove Madden LLP is an estate planning law firm and the first in the United States to establish a national online estate-planning law practice.



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At the ABA TECHSHOW in Chicago in March, the firm was awarded the 2012 American Bar Association's James Keane Award for Excellence in eLawyering, given annually to a law firm that provides outstanding, innovative delivery of legal services via the web.

All virtual reasons aside, Jamie Hargrove, the firm's Founder and Partner, points to a bricks and mortar reason for his firm's success. He notes one of their key strategies has been to stay grounded and centralized in their base offices in Louisville and Lexington, while having offices in more than 20 states and a stated goal to be in all 50 before the end of 2012. Hargrove explains, "It is important for us to expand our business, while still keeping to our original roots."

### HOW E-LAWYERING WORKS

Hargrove Madden's personalized touch, paired with low-cost, comprehensive estate planning services delivered through the Internet, is undoubtedly unique. Clients complete a multi-media questionnaire designed and managed by lawyers. Then, they select an estate plan based upon the needs identified by their "decision-tree" questionnaire response. Hargrove Madden then follows up directly with the client to ensure the documents and the plan selected is both consistent with the client's goals.



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The resulting legal documents go through quality assurance checks and are finalized by attorneys licensed in the client’s state to ensure state compliance and appropriateness for the client’s particular situation. Hargrove painstakingly ensures that every state’s compliance requirements are met for each client. This attention to detail eliminates risk that the firm is exposed to by practicing law in multiple states.

Plans are delivered to the client by email or regular mail, along with in-depth execution instructions and other beneficial information as necessary. The secure web-based client portal is also available 24 hours a day, seven days a week, making it a convenience not only to clients, but for Hargrove’s lawyers, too. Hargrove Madden has also invested in hiring consultants and trainers to help implement its online system throughout the firm. Hargrove remarks that making sure everyone is on board with the idea of an online practice is another key element to going online successfully. His firm “did its homework” as to what would be best for the firm and then only trained lawyers and staff on features that were absolutely needed. Hargrove notes that there are probably about 25 features of any program that are going to be the most useful for a company to apply, so general training can be focused on that top 25 and super users can always ask for advanced tricks if they so desire.

#### TECHNOLOGY IS THE KEY TO GETTING AHEAD

The efficiency of the Internet has allowed Hargrove Madden LLP to aggressively price its online services, which gives their clients access to professional, yet affordable documents and services. With this model, estate planning services are now accessible for middle income clientele as well as high net worth individuals. “This has enabled peace of mind and assurance in our clients’ minds that their families are well-protected,” said Hargrove. “The Internet has also allowed our firm to effectively manage our lawyers, clients and our array of cases.”

They have effectively used online services as a way to maximize their firm’s already reputable success. Their business model for implementing an online service is definitely one to reference and their partners are the ones to look to for advice. All the firm’s documents are profiled and stored on the Worldox document management system, which helps Hargrove stay on track with the work that all 30 lawyers are doing. The firm uses Citrix for remote access and stores all documents on a professionally managed off-site server.

#### IS E-LAWYERING RIGHT FOR YOUR FIRM?

Many law firms are evaluating whether they want to do e-lawyering and put part or all of their law practice online. Hargrove is straightforward when sharing his advice to these firms: “Keep your day job!” he said. “Build a successful law practice first and then transform it into an online practice or hybrid, not the other way around. Build upon an already stable and proven business model and then implement an online system where it makes sense to do so.”

Hargrove recommends that firms do research first and answer the big questions like, “Why are you going online?” and “How will it help your firm?” Also, he suggests that administrators go back to their existing business partners and discuss what else their incumbent solutions can do for them before investing in new technology. Look into what features you already have access to and see if you can design something with those business partners to enable your online options.

Hargrove Madden LLP won this year’s e-lawyering derby. If you do your homework, stretch your technology and build a healthy practice that can take root online, your firm may just win the next one! ■

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#### About the author

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