Steps To Streamline Your Processes

by Rebecca Sattin

REBECCA SATTIN

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For many years, there has been a bright spotlight focused on the need for training for greater efficiency in law firms. This illumination has boosted demand in the legal profession for both project management personnel and products to improve efficiency.

Efficiency can only be enhanced by combining the insight of legal team members with the expertise of IT to tailor software and procedures to the firm's needs. Streamlining processes requires an understanding of in-house functions and needs, an analysis of existing processes and software to locate areas for improvement, and the creation of policies to ensure compliance.

To accomplish these tasks, IT must work with other departments within the firm to understand business requirements before beginning process improvement. Here are some things to remember as you work through the streamlining process:

» **Analyze the capabilities of existing products.** Many firms already have products that can help achieve greater efficiency but do not realize the products' functional capabilities. Check to see if your software products have overlapping capabilities; if so, ensure that end users are choosing the right product for the right task, and downsize where feasible. Analyze what problems still need to be resolved before considering new software.

» **Keep unaudited document movement to a minimum.** Ensure internal links to documents are sent only to people within the firm. Use products that allow sharing of documents while maintaining a full audit trail on activity.

» **Develop curricula that provide continuing legal education (CLE) credits.** Most attorneys do not

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want to sit in a training room when they could be providing legal services to clients, so lure your attorneys to classes on revamped processes with CLEs and a reminder of the changes to the American Bar Association Model Rules requiring that they stay current on their knowledge of "the benefits and risks associated with relevant technology."

» **Invest in an online training system.** This helps keep training time to a minimum as information can be viewed individually when attorneys have time.

» **Arrange meetings with larger clients.** If there are clients for whom your firm does repetitive work, include their part in the process in any analysis and address their security concerns.

» **Ensure all members of the team understand the big picture.** Every person who has a touch point on a process could have insight that could increase efficiency for the whole project.

Thoughtful analysis of problems, processes and existing products often leads firms to realize they do not have to reinvent the wheel to achieve their goals. When feedback is solicited from all parties — legal staff, IT developers and clients — most communication hurdles can be overcome, and the resulting collaboration results in streamlined and intuitive processes. **P2P**
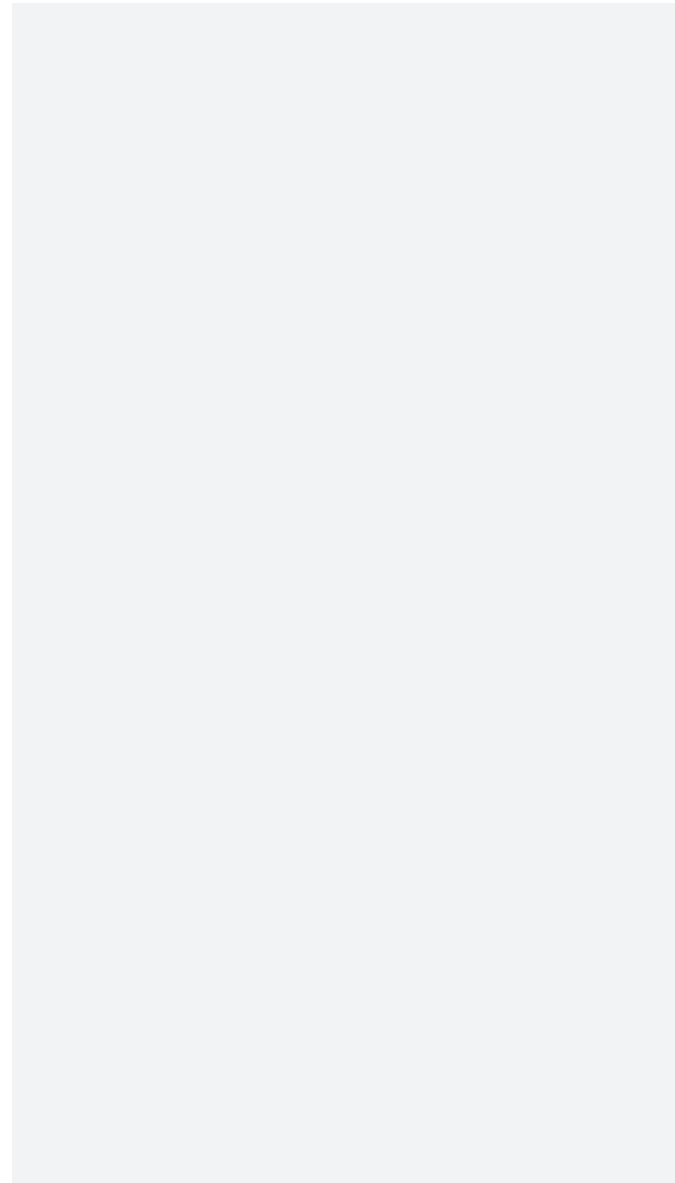
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