

# TECHNOLOGY FOR LAWYERS 2004

**Better Faster Cheaper**

## **BFC2: Practice Management Software Face-Off: Time Matters vs. Amicus Attorney**

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The Law Society of  
Upper Canada

Barreau  
du Haut-Canada



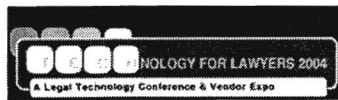
**OBA • ABO**

Ontario Bar Association  
Association du Barreau de l'Ontario

Canadian Society for the Advancement  
of Legal Technology

L'association canadienne pour l'avancement  
de l'informatique juridique





## Practice Management Software Face-Off:



Time Matters  
vs.  
Amicus Attorney

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## Your Presenters:

- ♦ David Bilinsky
- ♦ Brian Cameron
- ♦ Daniel E. Pinnington

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## The Four Tasks

- #1 - Initial Contact with Client
- #2 - Send a Confirmation Letter
- #3 - Respond to a Client Email
- #4 - Start a New Day



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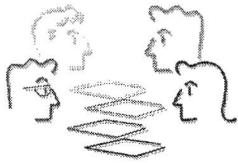
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### Who is with us today?



- Lawyers
  - Size of Firm
  - Practice areas
- Administrators
- Technology staff
- Consultants
- Vendors
- Others?

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### Make this Session a Hit

- Who is using PMS?
  - Which products?
- What areas must be touched upon to make this a hit?



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### Practice Management Software: The Basics



- ✦ Tool for everyone
- ✦ Matter centric (not contact centric)
- ✦ One database with all the information you need to run your law practice
- ✦ Be more efficient, effective and profitable
- ✦ Help you avoid malpractice claims too!

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## Different Strokes for Different Strokes: The Options

- ✦ Time Matters
- ✦ Amicus Attorney
- ✦ ProLaw and ProLaw Ready
- ✦ Practice Master
- ✦ AbacusLaw
- ✦ PCLaw (basic CMS functionality)
- ✦ And dozens of others...
- ✦ Find the one that works the way you do



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## Making It Work Successfully for You

- ✦ Get all your people behind it
- ✦ Appoint person to lead
- ✦ Understand how you do things
- ✦ Understand what PMS can do
- ✦ Plan, Plan, Plan
- ✦ Adapt your processes to work better, smarter, faster
  - *not* just to use PMS features
- ✦ Knowledgeable support for implementation
- ✦ Training, Training, Training
- ✦ Change is not a one time event
- ✦ Everyone has to use it



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## Task 1: Initial Contact with Client

- ✦ Take a call from a potential client
- ✦ Check for conflicts
- ✦ Schedule a meeting



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## Task 2: Send a Letter

- ✦ Generate an initial client meeting confirmation letter to the new client
  - Use document assembly
- ✦ Docket the time



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## Task 3: Respond to a Client Email

- ✦ Receive a client document via Email
- ✦ File the document in the matter
- ✦ Check the matter status
- ✦ Respond to Email



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## Task 4: Start a New Day

- ✦ Keeping on top of things
- ✦ A lawyer's routine to start the day
- ✦ Reviewing:
  - Deadlines
  - Limitations
  - Communications
  - To-do's



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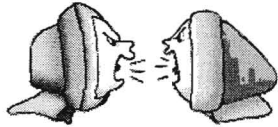
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## Some Final Comments

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## Our Thanks!!!

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**And questions please!**

*Dan David Brian.*

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