

Clients Want More for Less, and Attorney Satisfies Them While Billings Rise 20 Percent

The Law Offices of Spence & Buckler, P.C.

Overview

Location: Towson, MD

Industry: Legal Services

Customer Profile:

Spence & Buckler P.C. represents businesses of all sizes, including Fortune 500 companies, as well as individuals, in a variety of commercial and civil matters.

Business Situation:

Partner Adam Spence wanted to cut the time he spent on non-billable matters, increase his productivity on billable matters and eliminate the sea of paperwork that stood in his way.

Solution:

He adopted LexisNexis® Total Practice Solutions for time management and case management.

Benefits:

- Billings up 10 to 15 percent
- Greater productivity boosts client satisfaction
- Deposition preparation cut 30 percent or more
- Total matter preparation time cut up to 20 percent

Product Summary

LexisNexis Total Practice Solutions

Practice Management

- Time Matters®
- Billing Matters®

Litigation Services

- CaseMap®
- TimeMap®
- TextMap®

The attorneys at Spence & Buckler, P.C. knew that paper-based record-keeping and file systems could drown an attorney in paperwork, reducing productivity, billable hours and client satisfaction. That's why they turned to LexisNexis® Total Practice Solutions. By centralizing and automating both practice management and case file document management, attorney Adam Spence, a partner at Spence & Buckler, has been able to capture 10 to 15 percent more of his billable time, convert 20 to 25 percent of his time to additional billables and reduce deposition and trial preparation time by nearly 30 percent. The result: he meets client needs more quickly and cost-effectively—which he says is the key for success in building client loyalty and increased business in the increasingly competitive legal environment.

Situation:

Adam M. Spence knows how easy it is for an attorney to be done-in by paperwork.

Spence's firm represents businesses and individuals in complex litigation involving bankruptcy, creditors' rights, asset-based lending, equipment lease enforcement, commercial landlord-tenant and lender-liability matters.

Several years ago, when he worked as an associate for another law firm, Spence took notes by hand and passed his handwritten timesheets to a secretary to be recorded. The system was far from perfect. A week or so later he'd receive a typed statement of his billable hours for his confirmation—as though he could remember how he spent each quarter of each hour days before. Nor was accuracy the only problem. It was tough to remember to “start the clock” every time he had a conversation or task on a billable matter—especially when he was at court on one matter and spending a recess or other free moment to make a quick call about something else. Inevitably, some billable time went unrecorded.

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Adam Spence, partner

Keeping track of all the e-mails and other correspondence related to his matters was another problem. Spence declared what he called e-mail “outbox bankruptcy,” giving up on sorting his heavy volume of outgoing e-mail messages into client folders. And when he went to review a given matter, the paperwork could be anywhere: on his desk, his secretary’s desk, a law clerk’s desk, in the office files or—for archived records—even at a remote storage location, requiring a time-consuming and expensive process to retrieve. And since clients couldn’t readily be charged for hunting down missing files, the time spent in that pursuit was a loss to Spence and his firm.

Even when files weren’t lost, they weren’t especially portable. Spence seldom had the files he needed when he was traveling. The inability to take all relevant files with him made it difficult to support his clients on fast-moving matters while he was out of the office or on vacation.

Preparing cases for deposition, hearing or trial further highlighted the paperwork problems that most lawyers face, including Spence. Given the complex nature of so many of his matters, Spence might amass several bankers’ boxes, with thousands of sheets of paper, for each matter. Worse than amassing that paper was reviewing it—and reviewing it again and again for each deposition, trial and settlement/mediation conference. Each deposition might require 10 or more hours of preparation and exhibit lists might take days to prepare.

And then there was the problem of being able to put his finger on the paper he needed when he needed it. Responding to a judge’s request for a document, case law or other support meant that Spence needed the relevant documentation at his fingertips—not always easy when it was impossible to anticipate every request. Nor could he always anticipate the claims that his adversaries or their witnesses would make in deposition, in arbitration or mediation sessions or at trial—claims that he might need to refute on the spot or let go unchallenged. The judicious use of documentation could be the crowning touch to a closing argument—but that meant being able to find the documentation in time and then having a compelling way to present it to the judge and jury.

“The ability to track time while I’m actually spending the time [that is, real-time time tracking] is huge, huge. To do it any other way is simply throwing money out the window—why would I want to do that?”

Adam Spence, partner

Solution:

Spence solved these paperwork problems with what he calls the “one-two punch” of “killer apps” from LexisNexis: Time Matters® and Billing Matters® software for practice management, and CaseMap®, TimeMap® and TextMap® software for litigation management. All are part of the LexisNexis Total Practice Solutions offerings.

Spence became acquainted with Time Matters more than seven years ago when he was still an associate. He continues to use the software at his own firm, and recently ordered Billing Matters, as well.

Spence organized Time Matters so he could store and retrieve information according to the discrete client matter as to which it relates. Spence uses Time Matters to maintain his calendar, his contacts and—after scanning in documents and converting them to Adobe® Portable Document Format (PDF) files—all correspondence and other paperwork related to his matters. These dates, contacts and documents are each linked to, and readily found by, reference to the specific client matter, making access to such information vastly more efficient.

Similarly, Spence also takes electronic notes of conversations with clients, opposing counsel, witnesses and even the court, which are then stored within each separate client matter. All of his e-mail is also sent from, and received to, Time Matters, enabling him to associate and find every received or sent e-mail with the relevant client matter by simply clicking on the e-mail tab in his client matter form.

The electronic notes taken by Spence also reflect his billable information (e.g., a note of a client phone call is also the billing note that appears on his firm’s invoices). Spence’s notes are immediately available to Billing Matters, which uses the same notes database. This enables the production of invoices that fully and accurately capture the entered information without the need to rely on after-the-fact memories (or to waste considerable time at the end of each day or week constructing billing records from memory). As significant, Spence does not have to re-enter or review the data in a separate billing program, saving both attorney and staff time.

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Adam Spence, partner

The software runs on every computer at Spence & Buckler, and mobile versions run on the partners’ handheld devices: a Palm® Treo™ 755p for Spence and a Motorola® Q for Buckler. The partners synchronize their mobile versions to their desktops every time they return to the office. Running the software on both desktops and handheld devices enables Spence and Buckler to capture time for every billable activity whether it’s in the office, at court, at a client site or while working from home or during vacation. Spence also uses the Time Matters remote features to work from his laptop and to bill, manage and retrieve case information as though he were in the office.

For managing the complex factual circumstances and the hundreds or thousands of pages of documentation associated with a matter, Spence & Buckler again turns to Total Practice Solutions—this time, to CaseMap, TimeMap, and TextMap software. CaseMap replaces the spreadsheets that they formerly used to keep track of people associated with a matter. Now, a CaseMap file on a case tracks people, facts, issues, document index, questions and case law. And beyond maintaining a roster of names and dates and facts, CaseMap provides quick pin-point links to the source documents in Acrobat format, so that Spence & Buckler can instantly find the relevant document whenever they need it, eliminating the need to search through or locate paper records. The attorneys of Spence & Buckler can readily access and print documents on the fly during trial for use as exhibits or to refresh recollection during cross examination or rehabilitation. Spence says he was so impressed with the ease of learning and power of CaseMap that he ordered it within the first five days of his 30-day free trial offered by LexisNexis.

Beyond creating both a single place to store the mountains of paper associated with a case as well as a way to organize the facts in those documents, CaseMap also allows Spence & Buckler to review facts to gain insight into a matter in ways that might not have been as feasible, or even possible, before. They can sort by any of the variables—e.g., people, facts, issues and so on—to immediately zero in on a single aspect of the matter and all facts and law related to that aspect.

“The LexisNexis tools enable me to serve clients more quickly, without the delays to track down requested documents and handle other administrative matters. That means my clients are happier. ... Happier clients are loyal clients.”

Adam Spence, partner

Spence & Buckler uses the Report Books feature of CaseMap in several ways: First, they have the client fill out the intake interview which creates the initial Case Map file. Then, after discussions and fact editing, they produce a report book with a few mouse clicks and share it with the client, to demonstrate that they have captured the client’s concerns. They also export date-based information to TimeMap to create a graphic chronology, which can then be printed, converted to PDF format or exported to a PowerPoint® presentation to share with others. They use a portable projector and laptop to present the TimeMap-based chronologies and CaseMap-housed information as part of closing arguments, and to score huge points during depositions, cross examinations and mediation sessions.

When Spence & Buckler needs to impeach a witness on the stand during a trial, they turn to TextMap software, which is also loaded on their laptops. The software stores all the depositions they took prior to the trial. If an unexpected issue arises during examination, Spence & Buckler can simply type a relevant keyword or phrase into TextMap and the software searches all the stored depositions and returns relevant excerpts—giving Spence & Buckler on-the-spot ammunition with which to conduct cross-examination.

Benefits:

“Time Matters, CaseMap and the other LexisNexis products complement each other so well for the litigator,” says Spence. “Together, they give you total control over, and ready access to, all of your information on a given matter, from the contacts, events, e-mails and to-dos, to the historical information and documentation, to even conversations you had about the matter that morning or two years earlier. They are beyond compare in what they help me accomplish.”

Billings Up 10 to 15 Percent

For an attorney, billing more without working more sounds like an ethics violation—but it’s all on the up-and-up with Time Matters, CaseMap and the related LexisNexis software. Because of the “real-time” billing entries, Spence estimates that Time Matters enables them to capture between 10 and 15 percent more billable time than they did with paper-based methods—the time that formerly went unnoted when he was making billable calls from his cell phone while driving, while at court during a recess or while working from home or on vacation.

“The clients said, ‘Wow, Adam, you just set the record for going through a status review.’ They were thrilled that I saved them time and had the right information, right away. Those are the sorts of things that keep the clients coming back.”

Adam Spence, partner

“The ability to track time while I’m actually spending the time is huge, huge,” says Spence. “To do it any other way is simply throwing money out the window—why would I want to do that?”

And that’s the least of the gain for Spence. He estimates that he can handle a 10 to 20 percent increase in his billable caseload—without increasing the total hours he works—thanks to the LexisNexis software. That increase comes from not having to waste non-billable time searching files for documents, checking and correcting his timesheets and performing other administrative tasks that are expedited by the software.

The ability to work from his handheld device also contributes to higher billings, faster client service and a happier lifestyle, all at the same time. For example, with all the Time Matters information he needs on his handheld device, Spence can enjoy a family vacation at the beach while making matter-related phone calls as needed to service the client and also capture the time spent on those calls.

“I’ve had several unplanned, and highly enjoyable, beach vacations thanks to the LexisNexis tools,” he says.

Greater Productivity Boosts Client Satisfaction

“LexisNexis tools maximize your time, make you more efficient,” says Spence. “That frees up your time—while maintaining or increasing your billings—and you get the choice of what to do with that time,” says Spence. For the attorney who’s still building his practice, the extra time can be invested in generating new business. For the established attorney with a family or active personal interests, the extra time can be devoted to family and personal pursuits.

“I have a full client load and I want to keep it that way in this very competitive market,” he says. “The LexisNexis tools enable me to serve clients more quickly, without the delays to track down requested documents and handle other administrative matters. That means my clients are happier. I can’t overstate the importance of that. Happier clients are loyal clients.”

For example, Spence recalls a large corporate client for which he was handling 70 active matters. Because Time Matters enables Spence to keep all matter-related information in a single location, he was able to run through the status of each matter during a conference call with the client in one hour—compared to the several hours that the client had been expecting.

“You’re capturing real billable time you lost before, and you’re cutting the fat out of the billable activities you conduct for the client. That’s delivering better value than clients have ever received—and that’s exactly what clients everywhere are demanding. For better or worse, we have to work more efficiently if we’re going to be successful. LexisNexis gives us the tools to do that.”

Adam Spence, partner

“The clients said, ‘Wow, Adam, you just set the record for going through a status review,’” Spence recalls. “They were thrilled that I saved them time and had the right information, right away. Those are the sorts of things that keep the clients coming back.”

Similarly, Spence sees the ability to instantly retrieve and forward a requested document from Time Matters or CaseMap as another great client-relations tool. “The clients get the information they want more quickly, and often during the same phone call—so it’s more useful for the clients—and they pay less to get it,” says Spence. “The law is a highly competitive business. I don’t have the luxury to practice it at a leisurely pace or to load the invoice with administrative charges. Time Matters and CaseMap are more than management tools—by helping me to boost client satisfaction, they’re client development tools. They give me a competitive advantage that’s helping to grow my business.”

Deposition Preparation Time Cut 30 Percent or More

Another key area for Spence of time-savings, productivity gains and increased client satisfaction comes in reviewing and preparing files prior to depositions, trials and arbitration sessions.

“I recall one time that I had set aside an entire Sunday to prepare for a deposition,” says Spence. “The first time I used CaseMap, I expected the preparation would take 10 hours. It took five and a half hours—that’s 45 percent less than I expected. I was shocked.” Similarly, Spence says he’s cut the time to review files and produce exhibit lists from days to hours.

For a large and complex matter, the time savings over the course of many depositions and court days can be significant. Spence estimates he can save up to 20 percent off the total preparation time for a major case.

“Some attorneys will be aghast at the thought of becoming more productive—and thus reducing billable hours for a given task,” says Spence. “But remember: you’re capturing real billable time you lost before, and you’re cutting the fat out of the billable activities you conduct for the client. That’s delivering better value than clients have ever received—and that’s exactly what clients everywhere are demanding. For better or worse, we have to work more efficiently if we’re going to be successful. LexisNexis gives us the tools to do that.”

About LexisNexis

LexisNexis (www.lexisnexis.com) is a leading provider of information and services solutions, including its flagship Web-based Lexis® and Nexis® research services, to a wide range of professionals in the legal, risk management, corporate, government, law enforcement, accounting and academic markets. A member of Reed Elsevier [NYSE: ENL; NYSE: RUK] (www.reedelsevier.com), the company does business in 100 countries with 13,000 employees worldwide.

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The Case Assessment & Analysis suite of products—LexisNexis® Total Litigator, CaseMap®, TextMap®, TimeMap® and CourtLink®—helps you pull together all the facts, issues and research in any case to determine the best, most effective course of action; quickly and with confidence. To learn more about our products and services visit <http://law.lexisnexis.com/caa>.

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