

Hassell, Moorhead & Carroll

Overview

Location: Daytona, Florida

Industry: Legal

Customer Profile:

Hassell, Moorhead & Carroll is a leading Daytona, Florida, law firm specializing in insurance defense.

Business Situation:

The firm's systems for invoicing, document management, and calendaring were outdated and inefficient.

Solution:

The firm switched to LexisNexis Total Practice Advantage™.

Benefits:

- Better cash flow from faster, more accurate invoicing
- Greater staff productivity from centralized matterspaces
- More responsiveness to clients, boosting client satisfaction

Product Summary

Practice Management

- LexisNexis Total Practice Advantage

Firm Sees Expedited Invoicing, Increased Cash Flow, Enhanced Productivity, Greater Client Satisfaction

Hassell, Moorhead & Carroll in Daytona, Florida, had grown quickly—but its aging technology hadn't kept up. Invoicing was laborious. A decentralized electronic document system kept people from quickly finding the documents they needed. Hand-kept calendars, while efficient, were cumbersome. So, the firm adopted LexisNexis Total Practice Advantage™. Now, invoice cycles have been cut from weeks to days and accuracy is up, boosting cash flow and freeing the beleaguered office manager to fight other fires. Centralized document management enables staff to find the files they need, boosting productivity and enabling more efficient staffing, as new hires or those newly assigned to a case can be immediately productive. Similarly, case-based calendaring enables everyone on a case to see all relevant deadlines and milestones, enabling them to collaborate more effectively.

Situation:

Usually, diversification is the way to grow. Certainly, most of the law firms in central Florida have used diversification as a way to expand their practices. Not so at Hassell, Moorhead & Carroll.

The somewhat contrarian strategy it's followed is to keep doing what it does best. In the case of Hassell, Moorhead & Carroll, that's meant focusing on its core strength as an insurance defense firm. In 2006, the firm, which had long had five attorneys, expanded its staff to seven attorneys. It also maintains four paralegals, a secretary for each attorney, and a receptionist.

While Hassell, Moorhead & Carroll had grown, the systems it used to run its business had not. It was still using an MS-DOS-based case management system it had purchased more than a decade earlier. Handwritten time slips for all of the firm's personnel were passed along to the office manager and receptionist, who entered them into the system by hand. The office manager, Laurie Marcus, would run the prebills by the attorneys, then laboriously input their corrections or changes line by line. She'd then export the bills to WordPerfect® for spell checking. The bills would be batch-run and sent out.

As the firm grew, Marcus found herself spending two hours a day to enter everyone's time, and two weeks out of the month to process the bills. "It wasn't supposed to be my primary task," says Marcus, "but it was the thing that consumed most of my time."

Meanwhile, the firm's calendaring and document management systems weren't any more functional. Calendars were kept in traditional double "redbook" systems.

“We wanted a one-stop solution that would give everyone the information they needed when they needed it.”

Laurie Marcus
Office Manager

A secretary would keep an attorney’s appointments in a diary on her desk and copy the appointments by hand into the attorney’s matching book. When attorneys needed to be located, staffers would first have to hunt for the relevant redbook. If someone was looking for coverage from a colleague, the medium of choice was a round robin of phone calls until an available attorney was found.

As for document management, each staff member kept the original versions of electronic documents on his or her own personal computer. Staff members couldn’t access each other’s files when they needed to collaborate on a document; the document’s owner would put a copy of the document on a central file share for someone else to use or reference.

“Every time we had to share documents, it slowed us down,” says Marcus. “You didn’t always know on which personal computer a relevant file was stored. When an attorney handed off a case to a colleague, it would take a lot of time to copy the entire file and put it in someone else’s directory.”

Solution:

To address these concerns, Hassell, Moorhead & Carroll considered several practice solutions, including the Windows® version of its own Perfect Practice software, which it rejected because of what it perceived as relatively poor integration and ease of use.

“We wanted a one-stop solution that would give everyone the information they needed when they needed it,” says Marcus. “No more hunting for information, no more calling around to find someone, no more half the month to process invoices.”

Hassell, Moorhead & Carroll found the solution it sought in LexisNexis Total Practice Advantage, a total practice solution with strong practice management capabilities that replaces paper file folders or computerized file shares with a central repository for all client information. The solution also includes invoicing and individual and group calendaring capabilities.

The firm decided on LexisNexis Total Practice Advantage in April 2006 and had the software fully deployed three months later. The paralegal and secretarial staffs participated in a two-hour training session on the software and Marcus conducted individual training sessions with the firm’s attorneys.

“I showed them how to do time slips, how to look for information,” says Marcus. “Within a day they had the concept and they began venturing into the software to see what it could do. There was a lot of experimenting, a lot of sharing of results, right away.”

With LexisNexis Total Practice Advantage, the time-slip process at Hassell, Moorhead & Carroll has undergone quite a change. Now, every billable person enters his or her own time. During the third week of the month, Marcus runs the prebills. Attorneys review them within three days. Spell checking is done within the same software—no need to export to a word processor—and edits and corrections can be made globally, eliminating the need to correct invoices line by line.

“Now, when there’s a problem to address, he sees it right away in LexisNexis Total Practice Advantage and can act proactively.”

Laurie Marcus
Office Manager

The calendaring function in LexisNexis Total Practice Advantage adds a case-oriented capability that Hassell, Moorhead & Carroll didn’t find in general-purpose calendaring software. In addition to using the calendar to maintain their individual appointments, staff members use the calendar to enter tasks and deadlines related to each case, which then appear on the calendars of every person assigned to that case. Deadlines regarding pretrial orders, discovery, and other procedures are all entered in Total Practice Advantage so that they cannot be overlooked.

LexisNexis Total Practice Advantage has also improved document management at the firm. Now, when a case first comes to the firm, generally through a phone call with one of the attorneys, the attorney turns to the computer to open a case and a document workspace for that case in LexisNexis Total Practice Advantage. As documents related to the case come into the firm, they are added to the workspace. Electronic files—generally spreadsheets, word-processing documents, and incoming faxes—are saved to the workspaces through the integration of Total Practice Advantage with other programs, such as Microsoft® Outlook® and Adobe® Acrobat®. Paper documents are scanned and saved to the document workspaces. Anyone who needs to access a case file—from the receptionist looking to direct an incoming phone call, to the secretaries, paralegals, and attorneys—now has one place in which to look.

Benefits:

Faster Invoicing, Better Cash Flow

With LexisNexis Total Practice Advantage, invoicing no longer consumes the bulk of Marcus’ time—and her firm is much the better for it. The two hours per day that she formerly spent entering time slips has been completely returned to her. And the two weeks it formerly took to process invoices has been reduced to six days. Marcus uses the freed-up time in various ways, for example, to plan and implement other enhancements to the firm’s technology infrastructure. She also has more time to attend to other office management duties such as personnel issues and financial reporting.

Meanwhile, invoices that used to take up to three weeks to process are now sent out after just a week. Formatting and spelling on the invoices are also more accurate, according to Marcus. Both factors contribute to increased cash flow to the firm.

And a more accurate and up-to-date financial record is also a benefit to Marcus’ boss, F. Bradley Hassell, President, who uses the LexisNexis Total Practice Advantage financial data to make better financial decisions, including setting staffing levels.

“Now, when there’s a problem to address, he sees it right away in LexisNexis Total Practice Advantage and can act proactively,” says Marcus. “That’s also the case when there’s cause for praise—he can praise immediately, which is great for morale. With LexisNexis Total Practice Advantage, there’s no need to wait to see how the firm is doing.”

Greater Productivity, More Efficient Staff Use

The document management capabilities of Total Practice Advantage are both boosting staff productivity and enhancing client satisfaction. The productivity gain comes because no one has to run around the office looking for a document, or for the person who may know where the document is.

“Clients get better service, which makes them happier clients.”

Laurie Marcus
Office Manager

Moreover, Hassell, Moorhead & Carroll can use its staff more efficiently, moving staff onto or off of specific cases as workload on those cases requires, without having to worry about bringing new people up to speed. When a paralegal or an attorney is added to a case, there’s no need to hunt for documents—the new person on the team can find exactly what he or she is looking for in a single place: the workspace for that case. Similarly, when a paralegal or attorney leaves a case, or the firm, that person’s knowledge about the case’s file doesn’t leave as well. The centrally located and organized file can be readily accessed by anyone else working on the matter.

Client satisfaction is enhanced because anyone who has occasion to talk to a client over the phone—whether it’s the receptionist seeking to direct a call properly or an attorney responding to a question about the case—has all the information related to the client’s case immediately available.

“With LexisNexis Total Practice Advantage, there’s no need to put the client on hold while you search for the information the client wants,” says Marcus. “As the client starts asking a question, you’re already clicking within the program and you have the answer ready the moment the client finishes asking the question. We were always organized—but this makes us look organized. Clients get better service, which makes them happier clients.”

No More Last-Minute Scrambling

Similarly, the fact that the calendar function in LexisNexis Total Practice Advantage alerts everyone on a case about deadlines and milestones related to that case means that it’s easier to meet those deadlines and milestones without last-minute scrambling. Professional staff can do their best work which, again, is reflected in greater client satisfaction.

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