

PROLAW CASE STUDY

CALIFORNIA DEPARTMENT
OF JUSTICE

MANAGING STATE-WIDE DEPARTMENT NEEDS
WITH PROLAW



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THE FIRST CASE MANAGEMENT SOLUTION OF ITS KIND

State Attorneys General offices (AG) may seem like typical government agencies, but they actually function as large law firms responsible for a variety of administrative, legal, and enforcement issues. The complexity of essentially serving as a state's law firm makes it necessary for AG offices to support large teams of in-house lawyers and legal support staff while occasionally working with outside counsel on specific issues requiring practice area expertise.

Because of their unique nature, AG offices have specific information, security, and confidentiality needs that require flexible and dynamic case management systems. These systems must have the capacity to meet technical, functional, and legal process requirements while also providing intuitive user interfaces and rich feature sets.

For the Office of the Attorney General, which operates within the California Department of Justice, ProLaw® fits the bill for case management across nearly 40 practice areas. Built from the ground up on a single database, ProLaw currently equips 2,300 staff with access to the entirety of the department's knowledge of case work.

When the department selected ProLaw in 1998 it was one of the first AG offices to undertake such a large case management deployment. Additionally, the department conducted its evaluation when ProLaw was still relatively new to the market. Nonetheless, its decision makers anticipated that the future solution would clearly align with their vision in terms of flexibility and ease of use.

"Out of all of the systems available at the time, ProLaw was the only one that presented a roadmap we could envision leading the department to long-term success," explains Project Manager Angelo Whitfield. "From the end user perspective, ProLaw offers an intuitive interface that is

easy to understand, and from a more strategic standpoint, we trusted Thomson Reuters Elite to be a partner that would work with us to create exactly the type of application that was needed."

According to Whitfield, the department was in fact able to design the system in a way that supports how end users across each practice area perform their daily activities, ranging from administrative personnel all the way through to those involved in litigation and prosecution. He says that the key to the successful ProLaw implementation was to have end users involved every step of the way.

"By meeting with each one of the practice areas during the planning stages, our project team was able to clearly understand users' processes and pain points," explains Whitfield. "Therefore, we were able to configure the solution according to what they needed to make their day-to-day processes successful."

ProLaw is an integrated software solution designed to automate the practice and manage the business of law. Built entirely on Microsoft .NET®, ProLaw combines case and matter management as well as time entry, billing, expense tracking, and accounting capabilities within a single integrated solution.

Overall, Whitfield considers the flexibility and customization features offered by ProLaw to be the solution's strongest selling points because they can be managed without relying heavily on the software vendor. Whitfield believes that this gives the solution a significant competitive edge because many firms and companies in need of comprehensive case management systems are concerned that they don't have the technical resources to develop such configurations. Instead of seeking full IT support, ProLaw clients can make many changes in-house, and there is even an established community of ProLaw users they can turn to when they need support.

CALIFORNIA DEPARTMENT OF JUSTICE

The Attorney General represents the people of California in civil and criminal matters before trial courts, appellate courts, and the supreme courts of California and the United States. The Attorney General also serves as legal counsel to state officers and, with few exceptions, to state agencies, boards, and commissions.

BUSINESS CHALLENGES

The department needed a flexible yet reliable case management solution to adapt to evolving regulations.

WHY PROLAW?

Built from the ground-up on a single database, ProLaw combines case and matter management as well as time entry, billing, expense tracking, and accounting capabilities within a single integrated solution.

BENEFITS

- Flexible configurations to adapt to evolving regulations
- Central repository replicates case information across the department
- Extensive docketing and calendaring capabilities
- Advanced reporting options for time and expense tracking

According to Nancy Sahn, program manager of the department’s case management section, flexibility is one of the single greatest benefits of ProLaw because her team has to react and adapt every time there is a change in state law. She elaborates, “The scalability of the solution allows us to efficiently and effectively react to new administrative initiatives and/or legislation, whether it requires us to perform simple updates to a single practice area or problem solve with more complex implementations.”

“There are only a couple of applications available in the market that offer such advanced docketing functionality, and ProLaw does it best.”

Nancy Sahn
Program Manager

A RELIABLE APPROACH TO DOCUMENT MANAGEMENT

According to Sahn, before the implementation of ProLaw, the department had no formal process in place for document management. Documents were sometimes stored in individual hard drives or shared network drives without any means of maintaining a common repository department wide. “A major issue here was that every time someone left the department, the retention of their institutional memory would be extremely difficult,” notes Sahn.

Today, the department’s document servers store and organize over 13 million documents and case artifacts, and nearly 300,000 documents are generated each year using ProLaw templates. Team collaboration has become much easier because important case information and documents are automatically replicated in ProLaw and available to staff statewide almost instantly.

ProLaw also made a major impact across the department by establishing consistency in the formatting of documents. Without the solution, a single type of pleading could have as many as 10 different design layouts.

“By granting everyone access to all of our department’s documents and templates, we have been able to establish uniformity in our legal decisions and presentation of arguments,” explains Sahn. “Best of all, we’ve been able to manage all of our practice areas much more efficiently.”

Sahn considers the advanced docketing features of ProLaw to be one of the most critical parts of the solution. Her team leverages ProLaw to translate the important milestones of a case and track court rules, automatically managing nearly half a million events each year.

“There are only a couple of applications available in the market that offer such advanced docketing functionality, and ProLaw does it best,” claims Sahn.

STAYING ON TOP OF THE BUDGET

As a state-run entity, managing legal budgets and case workload is essential. Deputy Director of Administration, Dave Harper, says that ProLaw has made an incredible impact on the department’s time and expense tracking. By integrating ProLaw with the existing accounting system, the department can combine cost information from the accounts payable system with lawyer fees, providing an accurate calculation of the true cost of each case in order to receive proper reimbursement.

“ProLaw is incredible because it captures important statistics, work measurements, and case management information, just by virtue of users doing their daily work,” states Harper.

The department enforces a lot of mandatory timekeeping policies to ensure that expectations are being met for the type of work that is being performed. Through ProLaw reports, timekeepers can review aspects of their time such as hours spent on billable versus non billable work, absences, and the amount of work performed in a day.

ProLaw also helps the department increase its efficiency by distributing workloads more evenly among its different offices. In the past, practice area managers would receive complaints that one city was being assigned more work than another, but with ProLaw, each manager can assess the validity of such claims and understand where there is capacity to handle additional workload or case reassignments.

“When we have visibility into day to day workloads and an understanding of where we can assign more work to a specific group, it really speeds up case progression,” says Harper. “I think that has been a huge success for the department.”

Harper appreciates that all of the aforementioned time and expense information is instantly available when generating important budgeting management reports. He explains, “We have shifted the governmental budgeting paradigm to the point where we use real time data to manage our resources. With the integration of a business analysis tool, we now can calculate monthly collection data and compare it to monthly expenditure data. When our revenue deviates from our projections, we can make immediate and targeted corrections.

This has made a significant difference in helping the department “live within its budgeted means,” Harper adds.

“ProLaw is incredible because it captures important statistics, work measurements, and case management information, just by virtue of users doing their daily work.”

Dave Harper
Deputy Director

“The ROI associated with the implementation of ProLaw and ongoing support have been realized by the benefit it has brought the department in terms of its funding,” concludes Harper. “The payoff in terms of workload distribution, human capital allocation, and resource maximization has been substantial.”

For more information about ProLaw, please call **(800) 977-6529** or visit **www.prolaw.com**.

