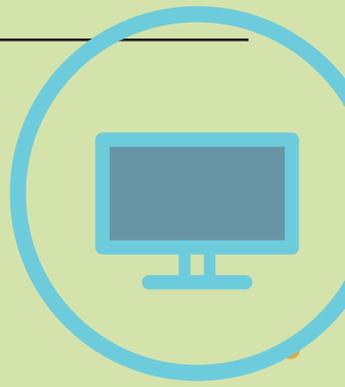


What to Ask When Selecting CMS



One attorney shares her top recommendations for what to consider when choosing case management software.

By Amber M. Pang Parra

I handle a diverse national docket, and my firm has several offices, with some staff working remotely in different states. Technology—particularly case management software (CMS)—has been essential to managing my staff and caseload as efficiently and inexpensively as possible. Selecting the right CMS for your firm can help you grow your practice; improve client contact and customer service; and make the best, most cost-effective use of available resources. Here are some of the questions I recommend answering before selecting CMS.

Does the CMS provide easy remote access for all potential users from any location?

As we've seen with the coronavirus pandemic, being able to work remotely is a necessity, and your CMS must support that. At a minimum, you and your staff should be able to log in and quickly access the system from wherever you are.

I found that a server-based CMS accessed through a VPN (virtual private network) was impractical because that system slowed down with each remote login. If you prefer a server-based system, check with your CMS provider whether the number of users on remote access slows down the system. During any test period, try out multiple logins from different locations—exceeding the maximum number of remote logins you anticipate—to alert you to any potential problems. Learning about limitations only after you sign a contract could be a costly mistake!

If you prefer a web-based system, determine whether it uses a particular app or can be accessed by a web browser.

Often, remote access by a proprietary app limits certain features or is only available to certain types of devices or operating systems. As an Android user, for example, I can't remotely access CMS through an iOS app. Overall, I prefer web browser access to ensure I can use all features when working remotely, without being limited to any particular operating system.

Is it accessible through multiple devices, such as a phone, tablet, or computer?

With remote work, you need your CMS to be accessible from more than just your laptop or PC. Make sure that's possible with any product you purchase. Using my CMS, Filevine, I can monitor my cases and tasks; send emails and SMS texts; and generate documents, pleadings, and letters using my phone, tablet, or computer as long as I have internet access.

I particularly love using a Kindle Fire HD 10—it's highly portable and inexpensive, with expandable memory and long battery life. I can easily use it while in bed or on an airplane, and I can pair it with a portable Bluetooth keyboard, which makes my remote work easier.

Will the CMS easily integrate with current systems and procedures?

I chose CMS that integrates with Dropbox, which my firm uses for document management. The CMS also works with Office 365, Slack (used for intraoffice communication and notifications), Vinesign (for electronic signatures), and Ringbird (our after-hours and overflow answering and intake service). Having tools that all work together makes it easy to share files,

keep on top of deadlines, and streamline our processes.

For example, with Filevine, an Outlook plug-in autopopulates the individual CMS project emails for each matter, so I can ensure that communications are copied and saved to the file. When I email opposing counsel or even the client, a copy becomes part of my electronic file, which is handy as a backup and to forestall any future disagreements about what was said. Ringbird also enters messages into projects in the CMS when we have after-hours calls or intakes, tasking the appropriate team member with following up. This integration saves us time, prevents duplication of effort, and helps ensure consistency.

Is it intuitive and easy to use, with a manageable learning curve?

Any system is only as good as the data you put in. To help ensure that whatever tools you choose are actually used, you need ones that new users can quickly adopt.

When researching CMS, be sure to evaluate how easy it is to learn, how soon you can incorporate it, and whether you are actually excited to use it. If a system is overwhelming or if the attorneys at your firm do not want to adopt it, then it will be difficult to get staff on board. Before choosing CMS, I made sure that my paralegals and I played with the system; tested the features; and discussed what we liked, what we didn't like, what we needed, and what we wished we had. This allowed us to evaluate ease of use and whether the CMS features provided were a good match for our needs.

We require new firm employees to use our CMS from their first day on the job,

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so they need to be able to hit the ground running. I draft a summary of litigation and an intake questionnaire that staff use to gather and enter information for each of my case types—instructions that are a page or two are manageable. I chose CMS that allows me to customize format and fields so that all information is in one place, and my reports can be tailored and run from the CMS to help me keep on top of my cases. This also makes it easier for my staff to monitor and complete their tasks, and they can create and run their own reports too.

Can the CMS evolve with your practice?

As attorneys, we must keep developing our practices. Having a responsive and customizable CMS makes it easier to branch out, develop your dockets, and work cooperatively with other attorneys. Look for CMS that allows you to easily create and edit taskflows for the various types of litigation you handle, customize tabs and reports, and share information with attorneys in cooperative ventures.

My practice has expanded and now involves personal injury cases, mass torts and products liability litigation, and veterans’ disability appeals. I have adjusted and customized my CMS to each of these types of cases, created taskflows applicable to each different type of litigation, and created fields for various types of reports and document generation.

Keep these questions in mind when choosing the right CMS for you—one that will help you better serve your clients.



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