

CASE STUDY

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The Firm

Founded in 2011, Miami Legal Group is a law firm that specializes in Personal Injury cases on a contingency basis. Immigration, Family Law, and Wills & Trusts comprise the remaining practice areas.

The Partner

Borek Consulting Group is dedicated to improving efficiency and reducing costs of law firms and other consulting businesses. The Group believes that thoroughly researching workflow helps a customer identify the most effective practice management solution for reaching its goals.

The Challenge

Miami Legal Group was a 100% paper-based office. Paper for note taking, paper for documenting files, a paper log to document phone calls, paper phone messages, and even a paper rolodex.

FROM ALL PAPER TO
PRACTICALLY PAPERLESS WHILE
SAVING 15-20 HOURS PER WEEK

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MIAMI, FLORIDA

“When I first saw the paper rolodex on a desk I thought, ‘that’s so quaint,’” said Shari Borek, President, Borek Consulting Group. “I thought it a cute decoration, and said so. They told me, ‘Oh that’s what we use.’ And I thought, ‘Oh no!’”

Everything was done manually. “If you wanted to know where a file was, you had to ask who had it,” said Miami Legal Group attorney Danay Acevedo.

When a client called to say they had moved or changed phone numbers, whoever took the call would have to track down the physical file, go to the actual information sheet, white-out the old information, and write in the new.

"We work with forms, so any time we'd need to send correspondence we would go by the information in the original Thank You letter created for a client when they first retained us," said Mario Quinones, Office Manager, Miami Legal Group. "If someone didn't change that information, more than likely the correspondence would be wrong, because everything came from that original letter."

The Ideal

Miami Legal Group wanted a turnkey solution for its organization and type of law.

"We wanted a software solution that could run our conflict checks; that was very important," said Mario. "The other must-have was an integrated billing component, so everything would be grouped together."

The lawyers wanted to supply their staff with iPads, so client intake could be completed from anywhere, while the client was talking with them.

The Selection

Danay and Mario looked at various practice management solutions for over a month, yet didn't like anything they had seen.

"We paid a monthly trial for a program for about two months, and in less than one month decided it was too limited and we did not like it, so we stopped paying," Mario said. "After getting the recommendation for Amicus Attorney from Jose Francisco, another lawyer practicing the same type of law, and seeing it was a reasonable price, we felt we didn't need to shop any more."

They watched an Amicus Attorney webinar that provided a comprehensive overview.

"Then we took the plunge and purchased," said Danay. "We decided on Amicus Premium based on the benefits it delivered. We subscribed to the Advantage Program, because the updates would always be included for us, we'd always have technical support to answer our questions, and we can access the program from anywhere with mobile devices."

After completing initial online training, both lawyers and staff realized that in addition to the software they needed more help.

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"So I called Jose again and asked how he did it," Mario said. "He recommended Shari, an Amicus Attorney Certified Consultant.

The Implementation

Once Shari entered the picture she helped with all of the settings and customization.

"She explained how to create reports, use the communication tools, how to search for conflicts, and helped us do the templates," Danay said. We couldn't have done this without her. She made us work and think."

Shari sat down with Danay and Mario to examine their entire workflow.

"We reviewed everything, and by doing that we learned a lot, cutting down information we had been inputting that wasn't necessary, and adding fields for information we needed that we didn't really have," Danay said. "She made us review everything before we inputted into Amicus.

Much time was spent customizing pages and fields, to the point of redesigning the paper intake page to match the customized forms in their Amicus Attorney.

"The new file intake asks for all of the information necessary for our custom pages, right when we're opening the file," said Danay.

There are 50 or 60 custom fields for their type of law -- everything from accident particulars to make and model of vehicles involved -- all information that flows to their documents.

"The planning was for precedents (task lists) and customization, so when we did the training, everything was already set up" Shari said. "Other clients wait until after initial training or later in deployment for further customization. This was on the unique side -- we started off with it done as completely as it could possibly be."

The Process

With the exception of files that were closed or were about to close, every file in the office went into Amicus Attorney. Entering 250-300 files required about three weeks of staff time.

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The Outcome

The firm no longer uses paper files for everyday client matters. The only reasons a paper file exists are to hold papers sent from outside the firm and a copy of the signed initial client contract.

“In the custom pages we have everything, that’s why we don’t need paper files,” said Danay. “We do everything in Amicus. We go into the notes and know what is happening.”

Every case requires letters, especially when first opened. Staff used to have to type all of the information asked for in every letter. Now generating a letter is automated and takes only a few seconds, because all of that information is pulled from the custom pages.

“We just have to click to generate a document,” Danay said. “We don’t have to do anything; everything is there at the tips of our fingers.”

At a glance with one click, any staff member can tell where a case stands -- even with hundreds of cases in the system.

Now when a client calls and asks, ‘What’s going on with my case?’ staff go to Client Last Name, click on Special Status, and instantly see the case status. Anyone in the office can see exactly where the file is and what’s happening with it. It has made for amazing collaboration in the firm.

“No more saying, ‘hang on please sir’ and going crazy looking for who has the file,” said Mario. “We’re not wasting time, which is very good.

For example, the first time Danay linked an email that came with a client’s file she was excited when all of the attachments that came with the email were automatically attached to the file.”

They are also enjoying the benefits of significant time savings. Mario and Danay estimate the firm is saving from 15 to 20 hours a week.

As the case negotiator for the office, Danay can now call every client on a weekly basis.

“I was never able to do that before, and I’m able to do it now,” she said. “I just have to click on the client’s name and it automatically provides me with all of his contact information. I don’t have to go crazy looking for information. I don’t have to get up and look for files. I’ve created task lists for myself in Amicus, and I don’t like to see them pile up, so I make sure I get them done.”

The majority of the firm’s cases are on contingency. If it was billing for time the savings would be even greater, because it is time-efficient.

“I totally love Amicus Attorney,” said Danay. “Yesterday I was not able to log on for a while, apparently due to a Microsoft update. And I went bananas.”

“MOVING FROM PAPER FILES TO AMICUS ATTORNEY NOW PROVIDES TIME SAVINGS OF **15-20 HOURS PER WEEK** ACROSS THE ENTIRE FIRM”



The Reasons for Success

This is an excellent example of a successful implementation of law practice management software, because Miami Legal Group...

a) Took the time to plan and prepare for what they truly wanted a practice management solution to be.

b) Invested the resources of the partner, the office manager and the billing person.

By including everyone they knew exactly what everyone required for maximum efficiency of the entire office.

c) Used Document Assembly to manage most forms and letters, in both English and Spanish, to minimize errors, maximize efficiency, and make workflow easier.

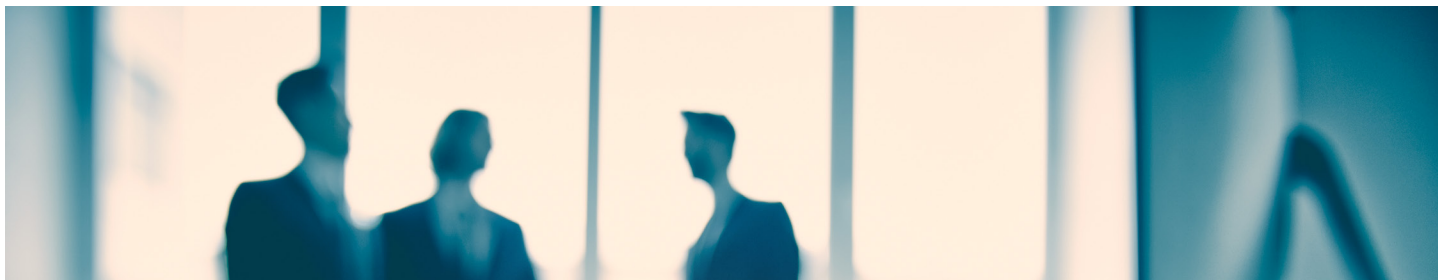
They open a form that is immediately populated by Amicus. They no longer have to fill in a form manually and save it somewhere. Without all that extra work they can handle increased capacity.

d) Had strong support from the management, which is rare.

Many managers say, "We want it, but we're not going to let the office administrators spend their time learning how to use it," and "We want it, but we're not going to invest in an expert to help us get the most from our software investment."

Managers who think they're saving money by refusing to pay for proper planning and training merely deny themselves increased efficiency and its resulting profit. Employees not consulted on their workflows won't use a new system, meaning the software investment yields only partial capability.

"Most want to invest minimally and expect massive results," Shari said. "Miami Legal Group knows the end result is worth it, and so invested the time and money. Now they're delighted by how their improved efficiency is making their practice increasingly lucrative."



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