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Practice and Case Management: Minimizing Legal Malpractice Risk



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Introductions

- Tom Rowe, Out of the Box Developers
- Ross Kodner, MicroLaw, Inc.
- Brook Boehmler, Thomson Elite

These Materials Are Online At:

- Out of the Box Developers:
 - www.otb-dev.com

- MicroLaw.com:
 - www.microlaw.com

Tom Rowe

- Out of the Box Developers and Practice Management Partners
 - Leading Time Matters consultant
 - Developer of Time Matters practice area template systems
- Attorney
- Formerly VP for Time Matters software
- Long-time legal technology consultant
- Frequent Author/Columnist, Speaker
- Technolawyer Consultant of the Year
- Lead Trainer – Time Matters Certification Programs for Consultants and Users

Ross L. Kodner

- MicroLaw, Inc. (1985) – Founder/CEO
 - Consultant to law firms and law departments worldwide on tech and practice management
 - Certified consultant on multiple legal tech apps
- Attorney
- Frequent Author/Columnist, Speaker
- Advisor to legal technology product vendors
- Technolawyer Consultant of the Year
- Legaltech CLE Co-Chair, ABA TECHSHOW Board, Glasser Legalworks Board, and planner for hundreds of state and local tech CLE events
- Developer of the Paper LESS Office™ process

Brook Boehmler

- VP – Thomson-Elite
- Formerly VP ProLaw
- Long-time LPMS industry expert
- Frequent speaker on LPMS and knowledge management topics

ROI and Malpractice Risk

- LPMS can reduce malpractice premiums 5% - 25%
- Malpractice carriers wouldn't reduce premiums if LPMS systems didn't reduce exposure

Top 10 Causes of Malpractice

- Missing deadlines
- Stress and substance abuse
- Poor client relations
- Ineffective client screening
- Inadequate research and investigation
- Conflicts of interest & conflicts of matters
- Inappropriate involvement with clients interests
- Lack of adequate documentation of work
- Zealous efforts to collect a fee
- Unwillingness to believe may be sued

Missing Deadlines

- Tickler systems / Daily report
- File inactivity watches / Malpractice report
- Rules based calendaring
 - Legalex Rules
 - CompuLaw integration
- Timetables
- Date calculators
- Automated procedures

Stress

- Most common cause – stress due the fear of missing deadlines
- Using a Delegation System to effectively assign and track tasks

Poor Client Relations

- Knowing who your clients are and what their cases are about
- Proactively keeping in touch with your clients

Conflict of Interests

- Global searches
- Conflict voting / Record review
- Chinese Walls – security issues

Lack of Documentation of Work

- Because tracking information is a core function of a LPMS system, that information is readily available
- Chronological timelines of activity

Title Here

- Item1
- Item2
- Item3
- Item4

THANK YOU!

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