

Finding Efficiency in Technology

By Diane Trent, paralegal at the law firm of Thomas M. Witcher

In a small firm, it's important to make the most of your limited resources.

Spending time pouring through piles of documents, trying to decipher a lawyer's handwriting on tiny scraps of paper or chasing down that elusive file folder is neither efficient nor enjoyable. As for me, at any given time my desk could be found underneath the scattering of up to 35 file folders.

Five years ago our firm – the law firm of Thomas M. Witcher – took the first step in automating the office with a case management software. It will save us time, we thought. It will save us paper, we thought. It will make our lives easier, we thought.

The package we chose, Time Matters, claimed to do all of those things and presumably it did. But after four years, we got tired of trying to figure out how. It also wasn't equipped to handle all of the types of law we focus on: social security, workers compensation and personal injury. Most of all though, it wasn't any easier to scroll through the maze of screens than it was to scroll through a manila folder.

Earlier this year we started using CyberDyne, Inc.'s CaseWizard 2000 and it has proven to be a tremendous asset to our office. Time is saved, paper is saved, our lives -- at work anyway -- are a little easier and those files on my desk have been reduced to only four.

As a paralegal, the most beneficial feature to me is the chronological rolling indexes that keep track of verbal communications. Not only is it effortless to input conversations but recalling them is easy too. If someone calls about a client, with just the touch of a button, I have all the conversations regarding that client's case on screen, in chronological order.

For administrators, it's also a blessing. Mary Henry uses CaseWizard more than anyone else in the office. For her the most beneficial feature is the document assembly, which works with several word processing programs to create templates. Gone are the days when Mary has to compose letters all day. With just a few keystrokes, not only is the letter finished, but all the individual client information is plugged in, mailing labels are made and it's ready to go.

"It's been an enormous help to me," said Mary. "Giving me better control and more time to manage client caseloads. As an office, we're so much more confident, knowing that the information we're looking for is right at our fingertips."

Unlike Time Matters, which we never mastered, our office implemented and was successfully using CaseWizard after one short afternoon of instruction from CyberDyne. But Mary and I both agree that one of the most refreshing things about CaseWizard and CyberDyne is the company's continued interest in our needs. At their request, if we find aspect of the program that could better meet our needs, all we have to do is call them and they work on incorporating it into future versions.

Together, the seven of us in the office looked at more than ten different case management applications before settling on CaseWizard. At first glance they all looked fine, but ultimately they were either too expensive, required too much customization or just flat out couldn't perform all the functions we needed it to.

Throughout the search Mr. Witcher insisted there was a package out there that could meet our needs, and he was right. In the end our collective patience and tenacity were rewarded with the right product for us. And along the way we learned more about our goals our needs and ourselves as legal professionals.