

## Technology for Solicitors – the Non case Management approach !

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The term “non case” management can sometimes help today’s lawyers and secretaries to overcome any concerns that “case management” evokes. All too frequently, legal organisations are denied and/or fail to achieve maximum benefits, simply because of perceptions that so-called “case” management is either inflexible or too complicated.

A “non case” approach, which focuses on the basics rather than on workflows, can help to foster inclusive consideration !

Given that many types of legal work are neither prescriptive nor suited to the use of workflows focusing on core requirements can enable everyone to extract maximum worth from IT. That said, what often constrains achieving returns from ICT is either technophobia or the reluctance to change. Digital dictation like case can help unfetter one’s earning resources from the clerical / typing role and be to everyone’s advantage.

### **Earning vs. Typing and Filing**

We now use word processing vs. typewriters and accounts software rather than hand written ledgers, but what some practitioners actually do may have changed very little. Although one to one shorthand sessions gave way to analogue recording and then in turn more recently to digital dictation, lawyers still continue to handle manila files of papers and correspondence, stored in intra office cabinets ☹. As the relative costs of capture, retrieval & e-storage continue to fall it’s now becoming viable to selectively scan in-coming mail and use electronic vs. paper access to progress on-going activity.

All sounds very simple, I hear you say and of course it is, but as with so many things a mix of non case, dictation and case may be the best approach ☺.

Although using standard word processing software, with manual indexing in folders and directories, may suffice for smaller organisations, this can have its own inherent challenges; R&B recently advised a 2 fee earner, 5 secretary, 2 cost clerk office that named documents in disparate ways, i.e. based on the preferences of fee earners and the senior clerk, using either date created, surname or first name. It worked, but was difficult both to maintain and to find & relate files when sharing work between staff.

### **Naming conventions ease retrieval and facilitate work-sharing.**

Document production ( using templates, precedents and merge fields to top and tail and more quickly create correspondence ), as well as auto indexing, are the basic enabling features of what we are choosing here to call NC (non case) Management.

Other NC features include linking - document production, time recording and diary activity - in a single action, whilst case management adds workflows.

For independent & impartial advice re legal ICT (usage, strategy & acquisition), please call David Riggall who’s been Leveraging ICT 4 Lawyers since 1994.

David is a **Chartered IT Professional** and a  
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