HAVE YOU FULLY HARNESSED THE POWER OF PARTNERSHIP WITH YOUR TECHNOLOGY SUPPLIERS? DOING SO WILL ONLY HELP YOUR FIRM TO ACHIEVE ITS PROFITABILITY, GROWTH AND OTHER GOALS.

ALA members had ample opportunities to network with legal technology business partners during the Association’s Annual Conference & Exposition, held in May in Boston, Massachusetts. (Exclusive photos by Robert Levy Photography)

From provider to partner
In the past, when firms have added to or upgraded their technology, many have thought solely in terms of numbers – such as how many laptops the firm’s offices will need, or how many users a network can support.

“Firms [have been] buying based on the total quantity they could possibly use,” said Mitch Schwartz, Director of Sales and Marketing at document management and legal support service provider First Legal Network. “But many have never thought in terms of vendors or service.”

However, as more firms look to maximize cost effectiveness in the ever-competitive technological marketplace, that may be changing.

“I have seen, in the last 18 months, that law firms are looking to leverage their buying power,” said Schwartz, who is also a member of the Association of Legal Administrators’ (ALA) Business Partner Advisory Panel (BPAP).

Establishing and maintaining a true partnership with a vendor – one that goes beyond a provider simply selling and installing a solution – isn’t always easy. But it can benefit both a law firm and its technology provider.

“Vendors who understand the law firm practice and business end of it can really adapt themselves into becoming partners,” said Jake Krocheski, a BPAP member and President of Client Connection Inc., which provides accounts receivable services to the legal industry. “[Clients] are technically getting advice.”

Building stronger partnerships with your current and future technology providers can help your firm to reach its profitability, growth and other goals.

Before your firm starts to plan its next technology enhancements, consider the following ways to create a more mutually beneficial business partner-client relationship.

BY ERIN BRERETON
STRATEGY #1: ASK PROVIDERS TO RECOMMEND SOLUTIONS

When firm Barnes & Thornburg LLP, which has approximately 540 legal professionals in 11 U.S. offices, decided to “green” its operations a couple of years ago, the firm faced a significant challenge: Getting paper that came into the office into digital format—and then filing it all—as simply as possible. The solution: A document routing platform called AccuRoute, which was suggested by Pitney Bowes, Barnes & Thornburg’s in-house facilities management provider.

“Our provider saw the issues we were having,” said Ted Boersma, Barnes & Thornburg’s Regional Director of Administration and an ALA member who serves on the Association’s Business Partner Relations Committee (BPRC). “[The new system] was kind of a game changer for us.”

The new system eliminated the extra steps it had taken to save documents in the previous software program to the correct locations and helped to improve processes at the firm.

“Because people could file things easily, they started doing it,” Boersma said. “Before, it was time consuming to file [documents], so it was hard to demonstrate the labor savings.”

AccuRoute also lets attorneys in different offices who are working on the same matters share information for active cases.

“That has helped our practice efficiency quite a bit, and we also use it for closed records,” Boersma said. “We’re sending less and less offsite.”

Because outsourced technology providers are experts in their fields, they can offer long-term solutions, according to Joseph Scott, Vice President and General Manager at court rules-based legal calendar and docket software provider CompuLaw LLC, and a BPAP member.

“We can help clients anticipate questions and issues they haven’t even thought about—which makes life easier six months down the road when they’re trying to integrate with another product or service,” Scott said. “We’re not just trying to sell them something and move on.”

STRATEGY #2: LOOK FOR SOFTWARE, SERVICES THAT SIMPLIFY OPERATIONS

By offering a city agency client a single contact—instead of four or five—First Legal Network was able to help the agency simplify the accounts payable process, Schwartz says.

“I was able to emphasize that one point of contact for multiple services and billing allows that city agency to set up one customer number,” he said. “I’m not always the least expensive. My pricing is competitive; the ease makes it valuable to customer.”

Outsourcing accounts receivable duties can also help firms to focus on meeting client needs and improving operations, according to Krocheski.

“Lawyers are great at providing a service, but [may] still have challenges running the business part of a practice,” Krocheski said. “Having someone manage the process helps them understand the logic behind why clients aren’t paying their bills to put better processes in place.”

STRATEGY #3: SHARE FIRM INFORMATION

For the past five years, Ulmer & Berne LLP, a 175-attorney firm with offices in Ohio and Chicago, has sponsored a vendor forum to encourage provider partnerships.

Approximately 10 to 12 of the firm’s current technology providers come to the firm’s Cleveland office for a full day to meet with the firm’s senior administrators and managing partner, who share the firm’s strategic plan and then split the providers into focus groups. Bringing everyone together encourages the firm’s suppliers to brainstorm software solutions that they may not have come up with individually.
“The program has been extremely successful,” said Glenda Raley, Ulmer & Berne’s Cincinnati Office Administrator and a member of ALA’s BPRC. “Sometimes IT professionals don’t always understand how an end user needs to use the product. It can be very, very helpful to get a group in a room to discuss it.”

At the end of the day, the firm also typically sponsors a cocktail hour to let firm staff and vendor representatives socialize with each other. Raley says the program has helped to foster a sense of teamwork and build lasting business relationships.

“It shows them we do value them as business partners,” she said. “[The program has also] made the vendors understand where we are trying to go with technology. We may not be buying it today, but may buy it tomorrow.”

**STRATEGY #4: ASK PROVIDER PARTNERS TO CHIP IN**

International, 850-attorney firm Goodwin Procter asked the company through which it leases its copiers to suggest the most appropriate and cost-effective model based on firm usage.

The firm has had a long-standing relationship with the supplier, which also provides employees to work on site to run the firm’s photocopy service center. Part of the success of the relationship has stemmed from the company’s willingness to work with the firm to offer additional services as needed.

Like many firms, during the recent economic downturn, Goodwin Procter re-evaluated its external costs – including its relationship with its scanner/copier supplier.

“We went back and asked, ‘Does this still make sense?’” said Janet Krause, Goodwin Procter Senior Office Administrator and a member of ALA’s BPRC. “And it did. As a business partner, [the company] was very willing to work with us because it wanted to keep us as a client.”

The supplier ultimately stepped up the service provided to Goodwin Procter, which allowed the firm to cut workforce costs.

“[The supplier] really made sure all employees were well-trained from an IT perspective,” Krause said. “If they were doing a video conference, they wanted their employees to be able to help out — hence, we didn’t need as many IT employees.”

**STRATEGY #5: AVOID SUPPLIERS THAT WANT TO SELL YOU COOKIE-CUTTER SOLUTIONS**

“We spend time at the firm,” said CompuLaw’s Scott. “It’s not a prepackaged sale. We go look at what they’re currently doing, how we can help on the calendar side and how to integrate that with the rest of their office suite of services.”

CompuLaw actually helped to set up user groups that schedule several brown bag lunch discussions each year about the product in major U.S. cities. The user groups act as

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**ALA AND BUSINESS PARTNERS**

The Association of Legal Administrators (ALA) has long realized the critical roles that technology providers and other suppliers play in helping its member administrators (and their organizations’ lawyers) deliver quality legal service. With that in mind, ALA continues to promote and support the power of partnership among legal professionals, their employers and providers of vital products and services to the legal industry.

ALA’s Business Partner Relations Committee (BPRC) is charged with analyzing the Association’s relationships and partnerships with companies that see the legal community as their market. The committee of ALA member legal professionals strives to add value to the relationships between ALA members and business partners by facilitating communication among business partners, ALA, its regions and chapters; providing resources for member and business partner feedback; consulting with ALA regional and chapter business partner committees to determine equitable value; and providing strategic input to the ALA Board of Directors regarding the business partner market.

ALA also has a Business Partner Advisory Panel (BPAP), which consists of representatives from six legal business partner organizations. Their objectives include helping the BPRC to prepare the business partner education at the ALA Annual Conference; providing suggestions and feedback regarding the exhibit hall at the Annual Conference, and regional and specialty conferences; working with the BPRC to enhance the understanding and appreciation of mutually beneficial relationships between members, business partners and ALA; and acting as a sounding board for the BPRC’s efforts to create a best practices environment at all levels of ALA.

To learn more, click on the “Business Partner Resources” tab in the menu on the left side of ALA’s website, www.alanet.org.
informal research and development departments.

“They tell us what they need that’s new and different,” Scott said. “Ninety to 95 percent of our enhancements come from that.”

Customization is key. When it comes to technology, one size rarely fits all.

“Software should not require a firm to change the way it does business,” said Beth Thompson, a BPAP member and Director of Sales at digital dictation workflow developer BigHand. “The software should be flexible enough to accommodate the way a firm does business and be a facilitator for change, if required.”

**STRATEGY #6: KEEP IN CONTACT**

The sale shouldn’t end when your check clears. BigHand, for example, offers an extensive training program to ensure customers are comfortable using its product.

“Whether the firm wants a ‘train-the-trainer’-type training or prefers a [BigHand employee] on site to train users and walk the floors afterward, BigHand is there every step of the way,” Thompson said.

Setting up regular, in-person meetings between a firm and a supplier also lets the business partner see if its product has been a good fit for the firm, according to Krocheski.

“[Vendors] need to be able to develop that rapport, instead of just providing a product or service,” he said. “Come back in 30 days, six months, a year and ask, ‘Are you pleased?’ You’re helping guide them through the process of figuring out what their technology needs are.”

**STRATEGY #7: GET REFERENCES – AND USE THEM**

“Do your homework,” said Thompson. “Reach out to your peers and find out who they are doing business with and why.”

After firm management at Goodwin Procter LLP decides what equipment is needed, the firm typically gets several bids to compare.

Positive previous experiences may get a provider in the door – but they won’t necessarily guarantee it the gig, according to Krause.

“If for some reason [the previously used vendor] was outbid, we would also check on references if we were unfamiliar with other business partners,” she said. “If the references came in exceedingly strong and the price was low and we were familiar with the product, we’d probably go with [the new vendor].”

**STRATEGY #8: BE AWARE THAT THE LOWEST BID ISN’T ALWAYS THE BEST DEAL**

“Given the state of where things are at with the economy, everyone wants to feel like they are getting a good arrangement, both financially and service-wise,” Krocheski said. “But the fact of the matter is it still comes down to what you can provide for products and service.”

Cost is certainly an issue to consider – but business partners that prove a value over time can be worth their weight in gold.

“[We want vendors to have an] understanding of where we’re heading,” Raley said. “This might work for me today, but is this going to work for me three years from now? Sometimes we don’t want an instant fix. We want to look at the long-term goal – and work together to see best way to get there.”

about the author

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