

4 Essential Functions of Workflow Technology

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An overview of the core functions workflow technology should perform in a law firm's quest to achieve greater efficiency.

By Eric Wangler | November 3, 2016



In the current legal landscape, it is not uncommon for clients to expect their law firms to work more efficiently, deliver better service and be able to justify the costs behind every charge on their bills. As a result, many firms seek to streamline their work and reduce costs.

Early on, many law firms tried to trim costs by cutting administrative staff. While this approach was a quick way to lower expenses, it negatively affected service and oftentimes lead to overburdened support staff. Attorneys also found themselves performing more administrative tasks and practicing less law.

Law firms today continue their quest to achieve greater efficiency and maintain quality service. One emerging solution is the adoption of workflow technology. Here are four essential functions workflow technology should perform.

Better Clarity in Task Delegation

A pain point in the workflow process is when instructions aren't clear and additional follow-up is needed. Workflow technology aims to address this issue by employing firm-configurable forms that are created for specific tasks to capture all of the required information before a task is delegated, with the goal of minimizing time lost to the back-and-forth too often necessary for clarification.

Resource Management

It used to be that every partner would have a dedicated assistant who intuitively knew their needs and priorities. In today's world, attorneys typically share the same assistant, or they use a centralized pool to assist with their back office tasks. This means law firms must carefully consider how to best manage the resources they have.

This is a key area workflow systems are designed to address. The right workflow system should help firms see at a glance how much work is in the queue, and what the specific deadlines are. It should also help firms proactively move work among employees or teams to eliminate backlogs and prevent missed deadlines.

Simple, Streamlined Task Delegation

It isn't realistic to assume that every assistant is proficient at every kind of task an attorney may assign. With a configurable workflow system, firms should be able to ensure tasks are automatically sent to the right person for the job, simplifying processes and maximizing resources.

Tracking and Accountability

Some workflow systems make it possible for attorneys to track their work via a mobile application. Also, many modern workflow systems offer a dashboard feature that gives users visibility to how many tasks are in the system, what the status is and who is working on them. With this information in place, firms can track metrics allowing them to assess whether projects are being done quickly and efficiently, while producing a quality outcome. This information is critical to making objective staffing decisions, and ensuring firms are staffed to meet client demands.

With the right workflow technology and processes, attorneys can provide better, more efficient service doing what they do best—practicing law—not learning new technology or overseeing administrative work.

Editor's Note: Eric Wangler is president of the North American business unit for BigHand, a workflow developer and consultancy.