



Case Study:

The Harris Law Firm Invests in New Technology to Deliver Exceptional Client Service and Results

Written by Chelsey Lambert, Author of Lex Tech Review

THE Harris Law Firm P.C.

Over twenty-five years ago, Rich Harris formed The Harris Law Firm, a Family Law Firm located in Denver, Colorado. Shortly after, his wife Lisa Harris joined the team to contribute her business management and marketing experience. Together the dynamic team has grown the law firm to fifty employees with no signs of slowing down.

During my interview with Lisa, who led the recent overhaul of The Harris Law Firm technology infrastructure, she shares her account of the journey that motivated the law firm to continue to invest in what they know differentiates the organization from competitors.

"We were one of the first family law firms to have a website. I can remember our infant son, sitting on my lap as I worked with the website development team to build it."

Right from the start, Lisa and Rich saw the benefits of technology throughout their practice. First, the website – generating business that other firms in their market were not. Next, the flexibility and reach that a portal and central database gave to their team. Even before there was a cloud, The Harris Law Firm staff found ways to work remotely. This was a convenience that was particularly valuable to Lisa, who was growing the law firm with her husband while simultaneously raising their children.

As time went on, the law firm updated the technology as needed but knew as they entered the beginning of 2018 that a substantial upgrade was required to continue to grow and serve their client base. Lisa Harris explains the motivating factors for the substantial investment:

"Our old system required multiple logins, we did not have a formal case management system and were using an older version of family law software for our case calculations. While the system was working, we realized that it was no longer the most secure or sensible way to practice."

The decision to upgrade The Harris Law Firm's technology began with a trial of a popular cloud-based practice management platform. However, in less than two months, Lisa realized that, while a good solution, this particular practice management platform would not meet the needs of the business.

The Ideal Solution - Centerbase

Lisa and The Harris Law Firm technology team went back to the drawing board, turning to 35*45 Consulting Group, a Centerbase Certified Partner specializing in law firm technology that can advise, implement and customize a combination of systems. After a thorough discovery process, the recommendation was made to implement Centerbase, plus two natively integrated programs; NetDocuments™, and LawToolBox™.

A clear fit, Centerbase won out over other providers as the most complete yet customizable cloud-based law firm practice management and accounting system. The level of business intelligence and forecasting that Centerbase provides is well beyond the capabilities of any standard cloud-based practice management program.





A few of the stand-out features for The Harris Law Firm include:

Firm-wide Calendaring

With multiple locations, managing staff and appointment calendars is nothing short of a challenge. With Centerbase's bi-directional calendar sync with Office 365™, The Harris Law Firm team can trust that both Firm-wide and Individual Calendars are up to date at all times. Color-coded calendar activities paint a clear picture of the day's events, and offer the convenience of billing time directly from a calendar appointment.

Expansive Document Storage and Management with NetDocuments

The Harris Law Firm has over two-million files and counting! For their clients, access to the twenty-five years of case files serves as an important differentiator. Previously, the firm maintained servers and were bound to traditional search capabilities. The powerful combination of Centerbase and NetDocuments™ allows Lisa and her team to benefit from advanced document management and security features without the hassle or headache of servers to manage.

LawToolBox

With over twenty attorneys and fifty plus staff, court deadlines and calendar rules cannot be left to chance. LawToolBox™ is integrated with both Centerbase and Office 365™, giving The Harris Law Firm team one source for accurate case-related calendar dates. In the event of a staff change, or absence, calendar updates can be easily rerouted to the appropriate

staff member, eliminating one more manual process from the team's to-do list.

Microsoft Office Add-Ins

When your team lives in Microsoft Word™, using both document and practice management systems that fully integrate can save hours every week by eliminating tedious time-consuming tasks. Tasks such as manually saving documents back to a file or creating separate time entries for work on documents. With the Centerbase Office Add-In, The Harris Law Firm Team can bill time directly from any document, save it back to the case file or choose to version and save the document into NetDocuments™.

Business Management and Process Organization

With so many new systems in place, the opportunity to customize their processes became clear. Additional customizations and policies are being added on an ongoing basis - a great example of the difference between an ordinary IT company, and one that intimately understands how law practices function. The 35*45 Consulting Group didn't just install Centerbase; they tailored their recommendations to suit the everyday business needs of each role, from front office receptionists, intake staff, billing department, and management. That's the power of Centerbase integrated with Office 365™, LawToolBox™ and NetDocuments™. Because the tools all speak to each other; automation, task lists and processes can be configured to create efficiencies in the law firm.

A bonus of the integrated system is the extensive business and financial reporting now available to Lisa and Rich.

Business administration, marketing, financial management and more can all be viewed from a central dashboard to provide an up to date outlook on the entire firm in seconds.

Technology as a Competitive Advantage

For The Harris Law Firm, technology is now part of every conversation with potential clients. Including a brochure in every client packet, titled '***Why Technology Should Matter to You***' that explains the security and legal representation benefits of the solutions they chose.

Specifically, the investment in Centerbase and NetDocuments™ gave The Harris Law Firm the ability to preserve over two-million files, to create a fast, searchable database of over twenty years of case history - a critical differentiator for their law firm. In Lisa's words:

"The best representation saves you money. Our database of case files and research is a critical part of the service we provide. Combined with our firm-wide commitment to security, we consider the impact technology has and invest in technology for our client's best interests. People should be demanding these things from their law firm."

Family Law, Child Custody and Divorce matters are some of the most sensitive and emotional cases attorneys can serve. By investing in the right technology, law firms like The Harris Law Firm can leverage previous casework, research, and results for the benefit of their current clients. The efficiencies that The Harris Law Firm technology team and 35*45 Consulting Group have built for the business with Centerbase and its integrated applications eliminate hours of unnecessary steps previously required to complete tasks - a clear difference in value for clients considering their representation options.

Room for Growth

Centerbase allows The Harris Law Firm to map out the features they plan to use in the future, and take advantage of these tools at a time that best suits their needs as a growing firm. As Lisa and Rich continue to build and refine their firm, they look forward to incorporating the following features of Centerbase into their overall business strategy:

1. Marketing Tools

Business development is top of mind for The Harris Law Firm. Centerbase included a set of tools that allow Lisa and her team to capture, track and manage the flow of potential new clients. Forms that can be embedded on websites, or special landing pages for advertising campaigns capture and deliver client information directly into the law firm's management system. Automatic email responses can be sent to the client, specific to location, while simultaneously assigning a task to staff for immediate follow up.

2. Automated Workflows

Individual workflows can be created for each case type, or by source of client. From the time a new lead comes in, automated emails, appointment reminders, or document requests can be sent to the contact without any staff interaction. When mapped out and implemented, this system prevents very little from falling through the cracks.

Centerbase offers the flexibility of being able to customize every detail from lead generation with forms that embed on the law firm's website, to detailed business reporting.

Looking Forward

The Harris Law Firm has always been a first mover when it comes to technology, now equipped with new systems to help them grow and business process automation with the ability to take their firm to the next level again is within reach. By streamlining their processes and bolstering the overall security of their client's files, the team will continue to deliver an exemplary level of representation even large firms can't compete with.

To learn more about The Harris Law Firm visit them at <https://www.harrisfamilylaw.com/>

To request a demonstration of Centerbase for your firm visit us at www.centerbase.com