

# The Lawyers Competitive Edge

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## Tapping the value of mobile activity

By Dan C. Felean

Today's workplace has "gone mobile," and nowhere is the trend more prevalent than in the practice of law. Starting with the dot-com era and continuing with the latest wave of corporate governance regulation, lawyers have become active participants in their clients' daily business decisions wherever and whenever they take place. As a key advisor, you must roam far from your office (and the comfort of your support staff) to attend client meetings, negotiations, hearings and consultations. Yet, while you are away serving one client, the rest of your clients still expect to be able to reach you and get a reasonably prompt and informed response. How to cope?

The convergence and simplification of technology now makes powerful handheld devices accessible to the rest of us. Instead of the "pant-drooping" belt-full of PDA, cell phone, pager and e-mailer, a normal non-technical lawyer can take advantage of sleek and sophisticated combination devices (e.g. BlackBerry Treo, PocketPC) that combine phone, e-mail, attachments, calendar and even walkie-talkie communications in one unit.

But it doesn't end there. Today's mobile handheld device also can provide powerful computing power that often eliminates the need to lug around a laptop. Smart handheld devices can connect you to the rich resources of the Web and link you to the resources of your firm.

### **Mobile Technology to the Rescue**

Advances in mobile wireless technology now make it possible for you to stay in contact and somewhat in control anytime and anywhere you go. Indeed, mobile technology offers busy professionals a certain amount of freedom and flexibility to balance work and personal life demands. Now, you can leave the office and stay connected in key decision whether from home, from your kid's soccer game or from a cottage on the lake. This substantially expands the range and context for response and service while freeing you from your desk. No wonder handheld mobile devices are currently the hottest item in law firms!

### **Mobile effectiveness is more than e-mail**

Mobile e-mail keeps the traveling professional in the loop, and provides a means to communicate wherever and whenever needed. However, limiting your use of a handheld device to e-mail does not really tap the true potential of mobile computing. An enterprise mobility strategy should help a mobile lawyer recover more from outside activity. It should optimize the value of the mobile professional to himself, his clients and his organization.

To be more effective outside the office, a mobile lawyer must have access to the two essential ingredients of any professional practice: knowledge and time. Capturing and leveraging these core assets wherever and whenever you work can transform your investment in mobile technology into an important revenue generator.

If you can use a handheld device to quickly capture what you are doing, there will be less risk of overlooking your work. If you can jot-down and save new items that you learn *while* you work, you and your colleagues will have more opportunity to leverage the value of that knowledge. A strategy that delivers these core resources to the mobile lawyer on demand can elevate mobile activity to become your competitive differentiator.

### **Time – The Core Currency**

Time is still the core currency for valuing a lawyer's work, justifying fees and compensating the lawyer. Yet, work performed outside the office is typically underestimated, inaccurately described or forgotten due to delays in capture and recording far. Flaws in the time-tracking process result in a direct loss of revenue to the firm and can mean longer workdays for lawyers.

A simple system for tracking mobile hours on a handheld device can help each lawyer gain a better return on his effort. It puts time capture conveniently closest to where and when the work is being done to improve personal productivity and increase the accuracy of services description. So, the phone call in the car or the e-mail last night can be noted at the moment of your activity to become part of your records back at the office.

Mobile time tracking is the one investment most likely to result in increased revenue, and it doesn't take much. The recovery of just a few more billable activities rendered outside the office by just a few lawyers provides a very healthy payback on the entire mobile investment and boosts recovery of their value.

"A lot of us, particularly litigators, are out the office quite a bit," says Glenn Zakaib, a partner at Toronto-based Cassels Brock & Blackwell. "Also, with clients on the West Coast, some of the things I do for clients arise

after hours. So, capturing time on my handheld device is just a better way to *not* lose time when I'm running from one thing to the next."

### **Knowledge – the Core Asset**

Mobile activity is also a rich source of up-to-date "actionable" information and knowledge about clients, cases, legal practice and business opportunities. The more you can leverage what you and your partners learn outside the office, the more productive and valuable you are.

When you walk into a meeting, you need to know what's the latest happening with the client, the case and the law. Similarly, when you leave that meeting, you need to quickly jot-down key information items on-the-fly for later use or to alert your colleagues. The longer the delay, the less you remember and the less effective you become.

A mobile knowledge capture system can also accelerate response and improve client service. For example, at Keesal, Young & Logan, a five-office California-based firm, lawyers use their smart handheld devices to track and manage workload. "With two clicks on a handheld, a partner can see if an associate is available to help on a case," said Justin Hectus, Director of Information at KYL.

### **Usability is the Key**

As much as lawyers are attracted to the newest handheld devices, it would be a mistake to assume any application delivered on it will succeed. On the contrary, mobile lawyers face more demanding circumstances and are more difficult to engage because of the typically limitations of being away from the office. Think of what you would be prepared to do while standing in a dimly lit corridor outside a courtroom or conference room with several things going on around you.

You face:

- **Physical limitations:** Small screen, tiny keyboard, bad light or “senior eyesight.”
- **Mobile limitations:** No support staff assistance, no reference, and limited battery/coverage.
- **Mental priorities:** Limited time, limited patience, too much to think about, many distractions - all resulting in a short attention span and a short opportunity for contribution.

Those firms who try to simply shuffle desktop screens to a handheld screen will surely fail. Most office computer screens are already too cluttered and demand too much time and attention from the average lawyer. Since as few as 25% of lawyers actually use desktop time entry systems, extending the same design to a less tolerant setting is not a formula for success.

The key to a successful mobile strategy starts with the usability of the applications. Here are the key attributes that a lawyer needs to effectively capture time or knowledge on a handheld device:

- **Simple & Intuitive** – You have no time for training or reference manuals on the road, and support staff is not available to help you. The mobile program had better be easy or it won’t get used.
- **Evident** – The layout must be clean and clear with plenty of space in between for immediate recognition and navigation on a small screen with dim lighting and plenty of distractions. (*Step into a dark corner and see if you can use it.*)

- **Shortest Path** – When you only have a few seconds to capture a thought, you need a quick, “in-and-out” process streamlined to the minimum info necessary. Needless to say, this is not the time to require time-consuming connections, validations or multiple screens.
- **Forgiving** – There is great value in instantly capturing an idea or activity that might otherwise be forgotten. So, your mobile system should accept anything. There should be no barriers to reject incomplete entries, since even partial information (e.g. “jones t/c”) can be used to jog your memory of a billable service performed.
- **Queuing** – Since mobile devices can quickly fall in and out of coverage, you need something that works even when not connected. Intelligent mobile applications can save and queue your entry to automatically send as soon as the device is back within coverage. (*Can you capture time on a plane?*)
- **Channel** – If your mobile device keeps a history of calls and e-mails (most do), you should be able to simply mail-forward them to your time or knowledge system at your office. A “tag & send” feature can be the quickest way to recover activity.
- **Leverage** – Most handheld devices have shortcut keys and features to make it ergonomically simpler to input information (auto text macros, click-scroll-click entry). Your mobile time and knowledge system should take advantage of these shortcuts to reduce effort.

- **Leverage office support** – Finally, a mobile system should recognize the role your assistant plays in helping track, edit and administer your work. For example, why validate data or spell-check an entry in a dark corridor, when your secretary can quickly check all your entries at her desk in less time, with less effort, and with greater accuracy?

#### **Rich source of value**

Mobile activity is a rich source of value in a law practice, so it is easy to see that practical mobile devices will soon become part of every lawyer's standard gear. How the individual and firm tap the potential of mobility will determine their return on investment.

Mobile activity-tracking is a simple way to recover lost law firm revenue while improving precision and client satisfaction. Mobile knowledge sharing can improve productivity, enhance client service and help lawyers make better decisions.

Empowering mobile professionals with *usable* time and knowledge capabilities wherever they work can be a key differentiator for the entire organization. It can bring greater productivity and efficiency to the individual and create new competitive value to increase your "return on mobile experience."

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**Dan C. Felean** is a lawyer and principal of PensEra Knowledge Technologies, developer of TimeKM™ ([www.timekm.com](http://www.timekm.com)), an in-office and mobile time and knowledge system for law firms and law departments. Dan has more than 25 years experience in law and technology, both as a practicing lawyer and as a consultant to law firms and law departments.

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**For more information, please contact:**



[www.pensera.com](http://www.pensera.com)

Tel: (800) 620-8881

Fax: (514) 874-0006