

As appeared in *Law Technology News*

December 30, 2014



Tips for Successful Calendaring & Docketing Systems

Pay as much attention to the people as the technology

For more than three decades, law firms have relied on automated applications in their ongoing battles to increase efficiencies, reduce costs, and mitigate risks. While technologies have expanded and improved, we must remember that the most important piece of any system is still the people.

Many firms learn the hard way that relying too heavily on technology, and discounting the importance of the people using it, is fraught with danger. Regardless of the application, it is only as good as the people—and the training of the people—who use it. Employing highly skilled professionals to work with your attorneys and your systems, within a defined firm-wide program, will align people, processes, and technology.

Calendaring and docketing are critical tools for law firms. Docketing is not simple data entry—it requires a solid knowledge of the rules and procedures promulgated by legal authorities, the ability to manually calculate deadlines and due dates in addition to relying on system generated reports, effective schedule management skills, and a strong attention to detail. Understanding how to interpret the rules and apply them in real life situations requires experience and development.

Be certain your docketing professionals possess a deep understanding of the court rules and agency processes specific to the practice areas and jurisdictions they will manage. When evaluating docketing personnel, determine that the candidate:

- Understands triggering events and their implications to deadlines.
- Recognizes out of the ordinary rules and procedures specific to a certain judge or court.
- Can explain the proper steps in any situation to make docket entries.
- Anticipates what happens after discovery and motion phases.
- Has knowledge of trial, post-trial, and appeal phases.
- Has experience with legal docketing systems, preferably rules based.

In some cases, a person with a wealth of legal knowledge and experience is unable to transfer that knowledge and understanding to a technology interface. Intuitively understanding the logic of the software is certainly as important as understanding the rules. Because it may be necessary to question the software, knowing how to get the answers the old-fashioned way, and calculating the entire process manually, is a necessary skill.

Documenting Processes

Documenting calendaring and docketing processes is critical. Your docketing professionals should play a key role in establishing, maintaining, and monitoring process adoption.

Create clear, comprehensive procedures. Establish a central point of control and designate who will be responsible for critical items. Identify steps, and assign a specific person at each office. Everyone on the team must be able to identify who is responsible for each process. Once standardized, make sure there are appropriate backups for an emergency. Regularly verify compliance.

Setting the policies and procedures is only half the battle. No matter how strong the system is, if anyone diverts from protocol it will not work properly, and can create a false sense of security. Change is uncomfortable for many people. Successful firms have found that identifying a high-level champion is helpful when adopting new processes. Your champion can reinforce the necessity of the process, defuse resisters, and prod reluctant attorneys.

A standardized, firm wide program can reduce the chances of making mistakes and helps identify errors quickly. Taking the necessary steps to avoid malpractice claims is not only easier, it is almost always less expensive than dealing with them after the fact. Your docketing professionals must be an integral part of this process.

Dealing with Vendors

When buying or upgrading technology, it is important to understand your vendor's service, support, and training processes (and any charges for such service). Here are questions to ask (and get replies in writing):

- What support options does the vendor offer?
- How difficult or challenging is it to manage the application, the updates, etc.?
- What kind of assistance will the vendor provide when you run into trouble?
- What training is offered for installations or updates?
- What routine training is offered to keep everyone abreast of updates?
- What training is offered for new hires?
- What are the costs of the above items?

Few situations are more embarrassing than a malpractice claim resulting from an administrative calendaring error. Legal calendaring and docketing is much more than a routine task, it is a vital part of the workflow at your law firm. The right processes, procedures and technology, supported by the right people, can minimize your malpractice risk while maximizing your firm's efficiency.

The bottom line: Technology is only as good as the people who use it!

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