

Using an Online Deadline Management System to Reduce Risk

By Troy Rackham

As a litigator with a particular focus on defending legal professionals in malpractice and disciplinary claims, I am keenly aware that managing deadlines is a critical part of every law practice. Missed deadlines are frequently one of the most common reasons lawyers get sued or their clients file grievances.

A lack of confidence in the calculation and management of deadlines results in attorneys spending time reviewing deadlines that would be better spent on building their practice or managing the substantive issues that win or lose a case.

The Problem

Too many attorneys fail to know that upcoming deadlines exist, or even if they know that a deadline exists, they fail to implement appropriate procedures at a firm management level to consistently make sure that every deadline is timely met. There is a greater risk of missing deadlines when they are calculated by hand, or in such a way that relies on people to docket or calendar the proper dates.

For example, at a previous law firm, we calculated deadlines using a manual wheel where a secretary or paralegal would point the trial date to a day of the year, and then the wheel would calculate the deadlines backward from trial. The attorney then would have to make sure that the deadlines were accurate and had been properly recorded in Outlook. This was a time-intensive activity that was susceptible to human error. You may not know who was entering what deadline or on what basis the deadline had been calculated.

When I joined a new firm, they were still using staff as the primary mechanism for calculating and docketing deadlines into Outlook. The attorney or paralegal would fill out a form describing the deadline and the due date, and they would send this form to the central office, which would docket the date, and push it out to Outlook calendars. While docketing was centralized, the calculation and updating of deadlines was still being done on a deadline-by-deadline basis.

Considerations for Deadline Management Software

Based on my experience managing my own cases and in defending attorneys in legal malpractice claims, it is important that any deadline system address certain issues:

- Online rules-based deadlines;
- Easy to implement and use;
- Reliability;
- Redundancy;
- Flexible Reporting;
- Seamless integration with Outlook; and
- Mobile/remote access to deadlines.

In particular, the difficulty in properly managing deadlines is compounded by the need for the deadline solution to seamlessly integrate with our Outlook calendaring program.

The Solution

In 2001, we first started using deadlines from LawToolBox at my former law firm because we wanted a deadline solution that would not only calculate deadlines, but would synchronize those deadlines into not only my calendar, but also the calendars for other users and teams. [LawToolBox](#) is cloud-based software that [calculates court deadlines](#) based on rules of procedure, and makes [court rule-sets customizable](#). Law firms use LawToolBox to calculate deadlines and can customize these

rule-sets by adding their own deadline templates and setting defaults to automatically omit the rule-based deadlines they do not need. This helps manage and reduce risk.

We also found LawToolBox deadlines integrated with our Outlook calendars really well. As deadlines are calculated, LawToolBox records who added or edited what deadline and when, and then synchronizes deadlines to my Outlook every 15 minutes based on my own format and reminder preferences. For example, one user for a case might get a reminder on their calendar on the day of deadline, three days before the deadline, and 14 days before; while another user on the same case might choose to get their deadlines in their Task list.

Because LawToolBox automatically synchronizes deadlines to Outlook, and those dates are pushed to my mobile device, I can look at my deadlines from anywhere. Most lawyers I know sync their mobile devices through exchange or a redirect. When deadlines sync to Outlook, if it is updating your mobile device through your exchange server in real time, then you can rely on the fact that your deadlines are where they need to be. I often take the light rail to work. At night on my way home, I can pull my reminders and see what deadlines are coming up. And if I mark them as complete on my iPhone or iPad, this will sync back through exchange to my Outlook tasks.

In 2006, the firm with which I was working briefly considered alternatives to LawToolBox. Our firm was using ProLaw for time entry and billing. At that time, we evaluated using ProLaw to also manage deadlines in place of LawToolBox, but our experience with ProLaw deadlines was not as successful. The deadlines did not automatically go into Outlook the way we wanted. We also could not get reports of all our cases by week the way we liked. So we stayed with LawToolBox. The feedback from the paralegals was that they really enjoyed using LawToolBox, and they were worried that if they switched to another product they were concerned that they would increase the risk of “putting bad data in, and getting bad data out.”

When I joined a new firm in 2011, firm management was receptive to managing deadlines through LawToolBox because it added a redundant approach to manage risk. Further, in my experience, carriers are receptive to products like LawToolBox because they want to know that a law firm has a solid docketing management system. Just like at my prior firm, paralegals at the new firm enjoyed using the LawToolBox online deadline management system so they could avoid the risks of manually calculating, entering and updating deadlines.

While I have primarily used the basic features described above, LawToolBox also has some more advanced features. For example, I am looking forward to trying the feature where I can share a case or a group of cases with a “read only” view to clients. Corporate clients want an ability to make sure that they are on the same page with their counsel. So in addition to the efficiencies gained by corporate counsel being able to view reports of upcoming deadline by case or by a group of cases online, this will empower clients to follow up with me regarding upcoming deadlines. Not only will the clients see their case information, but it will help them see how good we are at managing our cases. It will help give clients the information they need to make sure I get you what I need from them in a timely way.

Conclusion

LawToolBox gives me confidence in my deadline reports. I typically only have to do a first level of review, so I devote less time to worrying about deadlines or making sure that they were calculated accurately. I spend less time worrying whether my staff is doing what they need to do. In fact, I rely on the staff less for deadlines than I rely on the automation. This frees up my staff to do other work that is important to winning on the substantive issue of my cases. Any kind of docket or deadline management system becomes most valuable if you do not have to pay attention to it, and you have confidence that it integrates with Outlook. I can have my secretary or paralegal input the case info, then I can have confidence in the information showing up in my deadline reports or Outlook.

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