Law Practice Strategy
Practice Management Solutions for Solos and Small Firms

Staying ONIT: Project Management for Lawyers

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I love project management: I love the theory, the concepts, the function, and most of all, I love the results of using project management systems. All my projects, tasks, documents and notes are there, carefully input into my project management app (I use Nozbe to organize my brain), always open at the left side of my browser tabs. Everything is categorized, labeled, prioritized, and I just go there and see what's next on the list. It's a beautiful thing.

But that's just the personal organization side of project management. It's real power comes when you use it to plan your project, estimate costs, communicate, monitor workflow and execute tasks in a team environment. The ability to immediately connect with other team members and assess progress throughout the project's lifecycle enables you to track daily activity and spend, or evaluate and reassess your original plan if necessary. It is the monitoring system that keeps all the pieces of the project moving in the right direction and timely fashion and stay within budget.

All of which is why I was excited to see the launch of Onit: the first web-based legal project management system that accomplishes all of the above, and more. While the software is designed for legal departments, it is suitable for a law firm environment as well, with a few twists.

In Onit, each legal matter is, of course, a project to be managed. Once logged in, small icons (or panels) on the dashboard allow you to open a list of Projects, Recent Activities, Tasks, and Team Members from a global perspective. From here, you can obtain an overview of everything pertinent to each matter and, if desired, drill down to the slightest detail. You also have the flexibility to open or close the panels to focus on the information relevant to your task.

To get started, you first need to create a new project. Once you create the project, it is easy to add team members, upload documents, draft notes and assign project tasks. If you drill into a project, you will see three additional panels (Project Plan, Notes and Documents). From there, Onit become uniquely powerful because you can assign to-dos, set deadlines and reminders, add details about a task, estimate costs or attach documents. More importantly, the planning function enables you to set a course of action based on you evaluation of the matter and the direction it should take. If your team is involved in the long-term planning of a project, you can schedule a meeting with team members and review the various tasks within a few days.

This is actually a pivotal juncture for firms who employ value pricing, fixed pricing and other alternative fee arrangements. In those cases, the number one most important thing to do is price upfront. That means you need to analyze the case, the circumstances and how best to represent your client's interest to determine your fees.

Using Onit's planning, budget and estimating functions enables you to accomplish that within the system. And because change happens frequently, you can easily edit, add or update the information at the click of a few buttons.

Document management offers substantial storage for uploaded documents that are searchable, with rich versioning features. Another terrific communication component is that each matter receives its own email address within the system. The email addresses enables you to update your status and view the team's status on a particular project from anywhere email is accessible, through the web, iPhone or any mobile device.

And that's the FREE version.

The premium version, Onit Premium, offers an additional panel called "My Work," which is ideal for busy attorneys that manage multiple matters. More importantly, this version creates a pre-populated checklist of the immediate items that must be handled when you input a new case. The checklists are customized according to the type of matter you identify when you create the new case (i.e., contract, litigation, ethics violation, etc.), and are an efficient way to ensure your immediate tasks and obligations are met. For legal departments, Onit Premium includes electronic invoicing, invoice routing, workflow and approval, legal process automation, outside counsel guideline validation, template creation, project budgeting and reporting. For law firms using value pricing, fixed pricing and other billing alternatives, many of these functions simplify tracking the project's workflow.

Because Onit Premium is primarily designed for legal departments, it does not include a time and billing function. However, there are two web-based products that would work in conjunction with Onit. Time59 is an inexpensive tool specifically designed for solos. Bill4Time is a more robust program that includes 3 levels of service (one of which is free), and a widget that sits on your toolbar, allowing you to input the matter name and task, hit the start button, and it will automatically time you on the task.

As we march forward into the world of efficiency and cost containment, using legal project management systems is becoming more a necessity than a choice. The evidence of the system's popularity is seen in increasing development and upgrading of law practice management systems to include elements of project management practices. In a world where speed is increasing on information highways and clients are expecting more for less, practicing law without an internal workflow structure can easily lead to a crash course in disappointment. Using a system like Onit is one important way to stay busy and stay sane!