



AMERICAN BAR ASSOCIATION

LRIS Software Analysis Report:

**An Overview of 6 Lawyer Referral
Software Programs**

National Lawyer Referral Workshop

October 22-25, 2003

ABA Legal Technology Resource Center



Helping Lawyers Solve the Technology Puzzle

ABA Legal Technology Resource Center



AMERICAN BAR ASSOCIATION

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ABA Legal Technology Resource Center



What is the Legal Technology Resource Center?

- Department of the American Bar Association
- Provides research & assistance to legal professionals
- Write articles, create presentations, and create web content about legal technology
- The LTRC cannot provide product endorsements.



Lawyer Referral Software

Enables a referral
program to match clients
to attorneys by legal
issue



Why Lawyer Referral Software?

- Can streamline your business
- Captures data that can be used to better manage your referral program

Overview Process

- Literature Search...
- Surveys...
- Review of Company Web Sites
- Review of software



Types of Lawyer Referral Software Programs

- Homegrown/Customized
- Commercial
 - Stand-alone
 - Integrated

Homegrown/Customized Features

- Usually MS Access
- Advantage
 - Built to your specifications
 - Minimal Business Process Reengineering (“BPR”)
- Disadvantage
 - May not have time/\$\$/resources

Commercial Software Types

- Stand-alone – created specifically for lawyer referral
- Integrated – part of association management software (usually shared data with Membership and Accounting modules)

Commercial Vendor Types

- Smaller/Turn-Key systems (independent developers)
- Larger Vendors with Referral Software included in Association Management Package
- Bar Association developed



Important Components

- Report Generation
- Communications
- Easy access to referral history
- Speedy
- Cost-effective

Report Generation

- Day-to-Day Program Management
 - Which members have insurance expiring soon?
- Overall Program Management
 - Gauge areas of success and improvement
 - How do the number of referrals this year compare to last?



Communications

- Do you need email capabilities, fax, or both?



Easy Access to Referral History

- When a client calls, how easy is it to see the history of the case?
- Does your staff need multiple windows open?

Speedy

- Does it take a long time to get a list of panel members?
- Does the system seem to “chug”?
- This may be related to your network, the software data model, hardware, or all of the above.

Cost-effective

- Does not mean the least/most expensive
- Software must meet your needs

Nice To Have

- “Web-enabled”
- Web screen for clients to enter their own information **OR**
- Web-based, platform-independent system that only requires a browser



Mandatory Features

- Easy data entry
- Technical Support
- Intuitive Design
- Operating systems
- Scalable

Easy Data Entry

- Depends on number of calls daily and size of staff.
- Is there a Fast Entry screen?
- If interrupted, is it easy to find the record and continue updating?

Technical Support

- Training classes/consultant available? (should be offered during software rollout).
- Support Hotline/Email
- Affordable maintenance plan
- Free manuals and/or CD-ROMs provided

Intuitive Design

- Software must be easy to read, navigate, and use.
- Easier to train your staff if the panels make sense

Operating Systems



- Software should work on a variety of Windows Operating Systems.
- Slim pickings for Mac & Linux users BUT web-only is an option for some systems



Scalable

- What if my program grows? Will my software grow with me?
- Don't buy a bigger system than you need
- But don't buy cheap just to save \$\$\$



Now Playing...

- Alpha Five
- Gomembers
- iMIS
- Lawyer Referral eXtended (LRX)
- REFER
- The Associate



Coming Soon...

- Akron Bar Association
- Manage Your Association (MYA)

Don't Throw Your Money Away!

- User groups/meetings
- Extensive training
- Consultants/Staff contact
- Network





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