

Microsoft Office System Customer Solution Case Study

manatt

Customer: Manatt, Phelps & Phillips

Web Site: www.manatt.com

Customer Size: 450 employees

Country or Region: United States

Industry: Professional services—Legal

Partner: Pro Bono Net

Web Site:

www.probono.net/probonomanager

Customer Profile

Manatt, Phelps & Phillips, with 400 lawyers in eight offices across the United States, provides integrated, relationship-based services and prides itself on its public service and community involvement.

Software and Services

- Microsoft Office
 - Microsoft Office SharePoint Server 2007
- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2005
- Technologies
 - Microsoft SQL Server Reporting Services
- Pro Bono Manager from Pro Bono Net

For more information about other Microsoft customer successes, please visit:

www.microsoft.com/casestudies

probono.net
lawyers serving the public good

Law Firm Boosts Pro Bono Capacity with Practice Management Software Solution

“The software is essential to making sure our pro bono program runs efficiently and with continuity. The program’s success is a key factor in our ability to retain good attorneys.”

Cristin Zeisler, Director of Pro Bono Activities, Manatt, Phelps & Phillips

The pro bono program at Manatt, Phelps & Phillips is a source of pride and an integral part of the practice. But the firm needed to eliminate labor-intensive administration to meet strategic goals. Manatt deployed Pro Bono Net’s Pro Bono Manager, based on Microsoft® Office SharePoint® Server 2007. Year-end reporting now takes 80 percent less time. In 2008, this time-savings helped the firm achieve an all-time high of pro bono hours.

Business Needs

Manatt, Phelps & Phillips serves a global client base from eight offices in California, New York, and Washington, D.C. Founded in 1965, the law firm is committed to promoting universal access to the legal system.

Manatt can be involved in as many as 400 different pro bono cases at once, which it receives from pro bono and legal aid organizations. Referred to as “providers,” these organizations include the Alliance for Children’s Rights, the HIV/AIDS Legal Services Alliance, and Public Counsel. Cristin Zeisler, Director of Pro Bono Activities at Manatt, attracts cases to the firm, matches attorneys with cases, and reports on pro bono activities to Manatt management. Each

January, Zeisler must also deliver detailed status reports to the providers, who use the information to track client outcomes and bolster fundraising.

Zeisler, assisted by one paralegal, had to manually aggregate information from different sources including the firm’s matter management system, accounting software, time-tracking software, and files created in Microsoft® Office Word and Office Excel® spreadsheet software. Additionally, Zeisler relied on paper-based surveys to find out what types of pro bono work each attorney was interested in doing. Zeisler spent three weeks every January building reports for providers. This diversion of Zeisler’s attention from management work resulted in

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Office

a significant slowdown in Manatt's pro bono activities. In January 2008, the firm logged only 1,700 pro bono hours—even though the monthly average for 2007 was 2,500 hours. "To ensure that the program runs with no gaps in service, we either had to hire more people or use technology to stay on top of the data," explains Zeisler.

The system was also time-consuming for attorneys who had to respond to the surveys and who relied on back-and-forth e-mail communication with Zeisler to track their hours worked on pro bono cases. Because the attorneys have an average billable rate of U.S.\$400 per hour, even the smallest increment of time spent on administrative tasks is costly to the firm.

Solution

In 2008, Manatt adopted Pro Bono Manager, a hosted, Web-based system based on Microsoft Office SharePoint® Server 2007 that uses Microsoft SQL Server® Reporting Services in the SQL Server 2005 data management software to integrate data from the firm's existing systems for pro bono case management. Using customizable tools, Zeisler can easily track and report on cases to the firm's pro bono committee and providers. The solution is developed by Pro Bono Net, a nonprofit organization that works to increase access to justice through the innovative use of technology.

All new cases at Manatt are entered into the firm's matter management system. Now, Zeisler can automatically import information from the matter management system into Pro Bono Manager, rather than manually gathering the information. Using customizable "tags," she retrieves data from other Manatt systems about the provider, client, attorneys on the case, and amount of time spent. Pro Bono Manager also provides approximately

20 prebuilt reports, which include pie charts and graphs that make it easy for Zeisler to quickly publish detailed information on each case, office, practice group, or attorney.

Attorneys log on to Pro Bono Manager to view active pro bono opportunities and to track time spent on cases. They can also use simple check boxes to indicate their interest in various types of pro bono cases. Using the system's management tools, Zeisler sorts this information and matches attorneys with cases or training opportunities based on interest and professional development goals.

Manatt also plans to use the system to foster interaction between attorneys and the legal services community. "When an attorney indicates a preference for a type of case, and a provider posts a matching opportunity on Pro Bono Manager, an e-mail message will be automatically sent to the attorney with project information," says Zeisler.

Benefits

Using Pro Bono Manager, Manatt has streamlined management and reporting. By allowing more time for higher-value work, the new solution has contributed to the growth of the firm's pro bono program.

■ **Better insight into cases.** Pro Bono Manager allows Zeisler to centralize information for easier reporting. "With a few mouse clicks, I can view all the information about a case," says Zeisler. One of the Pro Bono Manager reports shows all open cases that haven't had time entered in the past three months. "It's a valuable risk management tool. It allows us to see case status in seconds. We couldn't do this before," Zeisler adds. For attorneys, the system provides easier access to career-enriching work because they can find cases aligned with their skills and goals.

Zeisler explains, "Our practice leaders also use the system to gain insight into the pro bono work their units are involved in and publicize this information to motivate other attorneys to get involved."

- **Faster reporting by 80 percent.** Manatt saves several weeks of attorney time each year due to Pro Bono Manager's reporting capabilities. Reports to providers are due immediately following the firm's fiscal year-end. "We used to practically shut the pro bono program down so that I could spend three solid weeks creating reports. This year, we reduced this time from three weeks to three days of my time," says Zeisler.
- **Higher pro bono capacity.** Time saved on reporting is time that Zeisler can spend growing the program. One year after implementing the system, Manatt logged 800 more pro bono hours in January than the monthly average for the preceding year. Zeisler's salary is now being spent on higher-value work that promotes pro bono activities. In fact, in 2008, Manatt reached a new high for pro bono work—33,000 hours. And attorneys report that the system, because it reduces administrative time, also reduces anxiety about meeting goals for billable hours when they're engaged in pro bono activities. "It puts pro bono work at attorneys' fingertips," says Zeisler. Finally, Pro Bono Manager helps the firm ensure that the program meets attorneys' expectations. Zeisler says, "Manatt attracts people with a deep commitment to service, who expect a broad range of pro bono opportunities. Pro Bono Manager helps us deliver on our strategic goals."