

Matter Management 101



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Are you negligent? That sounds a bit harsh, so let me rephrase it.

Do you deal with a large number of transactions? Do they involve a wide range of issues and lots of different interests?

Are you part of a large legal team, with multiple interactions and related responsibilities? Or are you a member of a small team, managing the legal issues on seemingly countless transactions across a large organization?

Do you use an effective matter management system?

If you answered *no* only to the last question, I would never suggest that you might be dicing with disaster, nor that it's great that you have an understanding insurer. Truly, your juggling talents may be extraordinary. Or you might be superhuman, really.

A few years ago, there were few viable alternatives to the traditional "it's all in my head" approach to managing multiple, complex transactions across the members of a legal department, even without matrix management across business units and jurisdictions.

OK, this didn't meet the simple "big red bus" theory of risk management (that is, "if I meet with an accident, someone else could take up where I left off, with hardly any break in the corporate stride"). Yet with no better alternative, even personal expiration meant that some grey-suited functionary would never mutter darkly about the carved acronym accompany-

ing your final journey: "Rest, Incompetent Professional."

Today, however, a slew of options exists.

Recognizing that legal departments needed more effective ways to manage complex transactions, progressive law firms offered extranets to their top clients. These often gave access to a wide range of law firm materials and data well beyond simple opinion repositories.

But even as other firms scrambled to catch up, some of the more sophisticated legal departments sent a message that multiple extranets, while an improvement, were no match for a single access point for their in-house counsel. Why go to many different law firm extranets, each with different functions and information, when you could have everything in one place, including the ability to produce reports covering all or any part of your work? The latest annual ACC-Serengeti Managing Outside Counsel Survey (available via www.acca.com) confirms falling use of law firm extranets as the deployment of matter management systems grows.

Nowadays, good matter management systems are available for all shapes and sizes of legal departments, often for a fraction of the cost of asking an IT company to build a customized system from the ground up.

For example, LEX, based in Australia (www.lex.com.au), produces seriously focused legal matter management, contract management, and IP management software. Having trialed the former, it's a form of advanced simplicity—especially for smaller teams. It may do pretty much everything you need, with complexity buried deep and intuitive simplicity on top, at the user interface. The company was founded by a former in-house counsel, which might

explain why the system simply works—and works simply.

Adopting a similar methodology at the other end of the spectrum is Serengeti Tracker, a "full flavor" matter management system. This system incorporates electronic invoicing, matter and contract management, reporting, and a host of web-enabled systems. It even lets companies search for more than 7,000 e-billing capable law firms in 125 countries.

Basically, if you can buy a book on Amazon.com, you are ready to use such systems to review legal bills, manage budgets, monitor status, and produce management reports. With some you can also exchange documents and other information with project teams and produce reports from anywhere with internet access.

Nevertheless, not every legal department needs a sophisticated matter management system. For some, internal calendaring software, spreadsheets, databases, and narrative reports suffice. For others, the traditional "it's all in my head" method remains appropriate. Yet as law departments evolve, an effective matter management system may become the foremost enabler for in-house lawyers to do more with less.

Concluding with an admission: I enjoyed a glass of good New Zealand wine as I wrote this column. Some might suggest that the question posed at the beginning ought to apply as much to occasional authors as it does to corporate lawyers of sobriety who continue to effectively manage complicated transactions by memory and instinct. I wouldn't quibble, but there remains value in freeing up a little more time each day so that you can draw more deeply from any receptacle of life you choose. 