

# Efficiencies and Quality through Automation

By Rita Speas

## The Use of Technology Set in Motion

In 1986, the firm's original founder, Robert M. Wilson, Jr., had the foresight to recognize the positive impact that automation could make as he defined the firm's case management system requirements. His vision consisted of a set of clearly defined steps within the process timeline, including the documents that were needed to generate upon completion of each step, client status reports, and supervisory workflow management reports. This model was the basis for the Firm's initial case management system.

Through the use of technology, these processes were streamlined to facilitate more efficient work and higher quality work product. There were templates in place which guided employees through the tasks, the timing of each step within the process, and the requirements of the preceding steps. The template design was flexible enough to support basic changes without re-programming. There was standardization, automation, efficiency, and improved quality in its infancy for the firm.

The Developers who implemented these systems, along with the firm's attorneys and operational staff, all came to embrace the efficiencies and work product quality gained through automation. All were eager to continue to improve upon the system's capabilities.

## A Changing Industry Landscape

The landscape began to change as forms of automation and client requirements evolved. Some larger clients began directing their referrals through third-party entities, delegating a portion of their data-handling activities. Unique processing requirements for each individual client became the norm, acceptable completion timeframes began to shrink, and varying client reporting requirements emerged.

Department managers and attorneys stepped back from their operations and re-examined their processes. They began to think outside of the box about how to comply with expanding client requirements via automation, how to increase efficiency performing the needed steps, and how to meet critical deadlines. They also identified manual interfaces that had the potential for automated integration. The firm's Business Information Development staff, attorneys, and managers worked together to shape these emerging application changes into reality.

## Aging Software and a New Solution

Over time, the standardization, automation, and efficiency that had served the firm well for years had become a challenge to personnel to use efficiently, as well as for the developers to maintain. This was chiefly due to the numerous system revisions, additional features incorporated, and ever-increasing client-specific processing requirements. The software components were aging and needed to be replaced with a more responsive solution and an improved user interface.

The firm converted to a commercially available case management solution. Today, with its built-in workflow engine, the Business Information Development staff can quickly address changing client requirements via process map and business rule revisions. The expanded automated integration

functions within the new case management system allow for a higher quality work product delivery in much tighter timeframes than previously possible. The firm's management and operational staff have also continued to work with the Business Information Development department to extend the efficiency and quality benefits of these features via additional reporting, automation, and interfaces.

## A Future of Innovation

The demand will always be there for technological solutions that increase efficiency while at the same time improve quality. This is not a luxury, but an expected and required element of the modern workflow. Automation is how we become faster and better and stay one step ahead of the crowd, all the while reducing errors and streamlining our processes.

The firm has always been proud of its standing with its clients. Automation, along with a knowledgeable staff, helps guarantee that standing and ensures the firm is as competitive as possible in the services it provides. This is a critical component that will allow the firm to continue to advance its culture of excellence and continually find new and ever more innovative ways to improve our processes and outputs.