

3<sup>rd</sup> Quarter, 2003

## **Third Edition**



*Keyhouse Client  
Survey.....*

*Bringing your needs  
into focus*

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# Welcome to our 3rd Newsletter

## Keyhouse Client Survey 2003 *Bringing our customers' needs Into focus...*



Justin Phelan,  
Managing Director

Almost three years ago, we conducted a survey of our then clients about various aspects of our service and their requirements. We gained valuable information from this exercise both regarding developments of our software for solicitors and our support and training services. In fact, we were delighted with the overall score we achieved from the survey, 4.3 out of a possible 5. 86% satisfaction is a great score in any circumstances.

Of course, at the time, we had about 100 customers. We have now more than doubled that number and the breadth and complexity of the software and services we provide has increased almost exponentially. At the time, the vast majority of our clients were using our SAM Accounts with a few using our Case Management system. Now we have a whole range of services and software – a much extended accounts system, time costing, fee earner desktop, enhanced Case Management, cheque requisitions, bill drafting, network installation and support, internet services, and so on.

Our purpose in doing the survey is twofold. Firstly, to find out what you think of our products and services and how you might like to see them improved and, secondly, to get your opinion on some issues and developments which we think may be important for solicitors in the near future. We will use the information and suggestions gathered to continue to develop and improve our services, taking our clients' needs directly into account. You will be receiving the survey pack in the next few weeks.

Over the last three years, our very success has changed the nature of our operation. At the time of the last survey, we were much smaller than today and I knew virtually everyone we were dealing with on a personal basis. Sadly, with the increasing complexity involved in our growth since then, I now only have occasional direct contact and spend much of my time involved in the direct business and management side of things. If I didn't, Keyhouse would not be able to provide what we do at the price that we do it.

Speaking of which, I have recently been investigating the market for general accounts systems, to find one appropriate for ourselves. Up to now, we have used our SAM accounts. We now require extra facilities we don't have, such as Sales Order Processing, Purchase Order Processing, Stock control etc. There are several of these systems about and they have potentially hundreds of thousands of customers. They are no more complex than the Keyhouse solicitors' software. In fact many are simpler. Nevertheless, the cost range for a six user system for us was between €8000 and €27000. When you consider that our software is developed for a maximum of 2000 potential customers and a typical six user system from us would be in the range of €3,500 to €10,000, depending on the options chosen, I hope you all appreciate the value you are getting!

Keep the comments coming in. They are all welcome.

*Justin Phelan ( [justin@keyhouse.ie](mailto:justin@keyhouse.ie) )*

# News....News....News....News

## **Hibernian Insurance & Keyhouse**

Hibernian has chosen the Keyhouse Case Management software to integrate with its computerised claims system, **eClaims**. Any claims that are identified as requiring legal advice will automatically be sent directly to the Keyhouse Case Management software.

Hibernian's in-house solicitors will be using the Case Management system to receive these automated instructions and manage their insurance files. The Keyhouse system will also send information back to the **eClaims** when the files reach certain critical points, such as consultations or court dates.



After researching three other systems Hibernian chose Keyhouse as their preferred supplier.

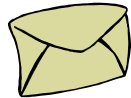
## **Eventful 3<sup>rd</sup> quarter for Keyhouse**

Not only has the third quarter of 2003 been just as active as the first 2 quarters, it has also seen Keyhouse commit to some new products for 2004. With the number of new installations still growing, Keyhouse undertook some market

research during the summer and identified a product that would compliment and integrate with Case Management, **Digital Dictation** software. It is due for release in December 2003. If you are interested in receiving more information contact us at [sale@keyhouse.ie](mailto:sale@keyhouse.ie) or 01-2040020.

## **€28,000 raised for David Houston**

Thanks to you and your contributions the "Walk for David" was a great success. We presented David with the cheque on the 4<sup>th</sup> September and he was overwhelmed by your contributions. It is not very often that one gets the opportunity to help make a difference but because of your response and the commitment of the Keyhouse team, David will be in a stronger position to fund his recovery. Thank you.



## **Keyhouse Case Management and O'Doherty Warren & Associates** *Converting from OPSIS.*

In November 2002 Kevin O'Doherty decided to convert from OPSIS to Keyhouse Case Management. The reasons were that;

- a) the firm now has one IT supplier for it's Accounts, Desktop, Case Management and computer network,
- b) there is only one client and case database for all their software systems,
- c) support and training services

# News....News....News....News

from the one company and  
d) integration with Microsoft Outlook for email and appointments.

Another factor to consider was that when case management was implemented that everyone throughout the office would use it. Because all of their cases were already in the SAM34 Accounts database, it was important to have everyone processing their work through the system.

Using Keyhouse's project management process the firm were able to implement key areas of work and have everyone using the software in a relatively short space of time.



The case management software is now managing the firm's conveyancing, litigation, criminal prosecutions and general work.

## **Mini Case Management for €250**

This is a straightforward case manager, diary and document management module.

The software will allow the user to create clients and cases, produce letters, email, diarise tasks and capture incoming documents – all

from the one screen.



A "To-Do" list will also be available so that users can schedule and action their work.

All of the features in this new product (*MiniCase*) are derived from the tried and tested modules of the Keyhouse *Case Management* product and fully integrates with SAM34 Accounts.

## **Dun Laoghaire Rathdown County Council (DLRCC) implement Web module of Case Management**

In August this year, DLRCC commissioned us to develop and implement a Web module for Keyhouse Case Management. Using the Web, various departments within the Council will be able to issue instructions to the legal department, via the Web, and review them at any stage.

Legal Services will receive the instructions electronically thereby removing the need to setup cases and reduce the amount of correspondence to their clients. This will both save time and improve access to information.

## IT Strategy – Next Generation (Part Three)

In the last issue, I outlined how you might approach formulating a reasonable IT strategy. On re-reading, it seems a lot to have covered on two small pages, so I must re-iterate that this series of articles is only intended as a starting point. These topics simply cannot be covered in detail in such a small space.

In this issue, I am going to address Project Management, Skills and Implementation – how to get the whole thing up and running. This may seem a little like putting the cart before the horse, since we haven't covered system selection yet. This is because some of these areas are important *during* the selection process, so it is best to cover them first.

Project Management, in fact, also covers the areas of skills and implementation. It is about defining objectives, allocating resources, agreeing schedules and monitoring progress against those schedules. This can be a difficult skill in itself. Some suppliers will resent your involvement at this level, preferring to proceed as it suits them. I would always encourage the project management to be a cooperative endeavour, between the firm and the vendor. No two firms are exactly the same in terms of their histories, information or personnel, and these can all have a bearing on the success of the project.

Initially, you will need to set out your selection criteria and some kind of assessment record. Schedule meetings with potential suppliers and view their wares. (This will be covered in more detail in the next issue). Be aware that you will learn a lot from the exercise of meeting suppliers.

You may decide to review your criteria based on the information that you glean from these meetings. Keep a record and make sure to re-assess offerings in the light of your new view. Another important thing to note here is that it is essential at this stage to involve all of those who will have an influence on the ultimate success of the system. This means accounts personnel, senior secretaries, administrators, legal staff and executive partners as appropriate.

You may need to acquire new skills to adequately evaluate the systems on offer. New technology may be required and new techniques. If required, you will have to either research them yourself or buy in the skills – usually in the form of a consultant. You may have an ongoing requirement for such skills in which case you will recruit.

Once selected, you need to formulate and agree a project plan and schedule with your supplier(s). This will require some coordination and will be largely dependent on what resources and personnel you can both allocate to the project. Be careful not to skimp here. I know that pressure of work can often create pressure for key personnel to be diverted. This is a false economy and will be reflected in the quality of the final product. You will agree responsibilities with your supplier. Be prepared for your list to be the longest!

What you require here is a simple table with 4 columns; Item, Details, Responsibility and Scheduled Completion Date. For example, Item could be Data Conversion. Details; description of data to be converted. Responsibility; Supplier. Completion date; as agreed. And so on. This is a clear plan set out in a simple way.

# IT Strategy for Law firms (continued)

The types of issues you will need to schedule may include:

- Installation
- Training Venue & Resources
- Training Schedule
- Data Conversions
- Phased implementation
- Data verification
- Precedent Documents
- Case Plans
- Infrastructure
- Sequencing
- User testing
- References/Codes
- Sign-off procedures
- Out-of-hours work
- Downtime

Regular meetings between yourself as project manager, and the other stakeholders – suppliers, personnel and other fee earners – to keep all informed and monitored, are important.

All of this may seem overkill for a small or small-ish firm. It may be – in terms of detail. But the main process should be essentially the same. Again, left to *ad hoc* methods, you will have a poorer result.

Above all, you must **accept that the responsibility for seeing that the project of implementing your new computer systems is ultimately yours** – your loss or gain.

Here at Keyhouse, we have done well from retrieving situations where the customer (you) had not managed things well with a previous supplier and called us in to “fix it”. The first thing we do in those circumstances is get agreement on responsibilities and acceptance of consequences. Difficult.

## Skills

Aside from project management skills, you will need access to an assortment of other skills. Your supplier should be able to bring a bunch of these to the table – installation, training, project management, process analysis. However, internally, you will need to be able to understand the processes that are important in your firm, how they operate, how they are going to be changed by the implementation and how to check that they perform as required.

Examples of this might be the requisitioning of cheques, bill drafting, document drafting and version control, e-mail, reception messaging, faxing etc. All processes – both simple and complex – that must run smoothly for your firm to function properly. Some will be show-stoppers. Identify them and check them thoroughly after initial installation and training as appropriate.

## Summary

To implement your system:

- Identify requirements
- Select supplier
- Assemble internal project team
- Set up project with suppliers
- Prepare project plan
- Train
- Identify critical procedures
- Test critical procedures
- Evaluate against defined requirements
- Frequent project review
- Sign off

That was an effort to cover a complex topic in a short article. Next issue we will cover System Selection

# The Clipboard

## Farewell to Chris Lawrence

Chris, one of Keyhouse's longest serving network engineers has decided to leave the IT industry for a more socially oriented career. He will be the new bar manager of "Black Toms" situated in Tinahely, Co. Wicklow.

Chris was a highly regarded member of the team and we wish him the very best in his new venture.

## Legal Accountants Conference



This year's conference is being held in the Castletroy Park Hotel in Limerick. Keyhouse will be unveiling a new product for the small law office; **CaseBooks**, which combines an easy to use accounts system and basic case management. To promote this new software any Keyhouse clients who only have the SAM34 Accounts system will have the opportunity of acquiring *gratis* a copy of the **CaseBooks** case management module. It will fully integrate with the SAM34 Accounting software.

## The Keyhouse Web Page

There will be a new look to the Keyhouse Web Page in the

beginning of October. We would greatly appreciate your comments and suggestions regarding the layout and content.

## Did the MSBlaster virus get you?

This was a highly publicised virus and it still managed to infect an awful lot of computer networks. While



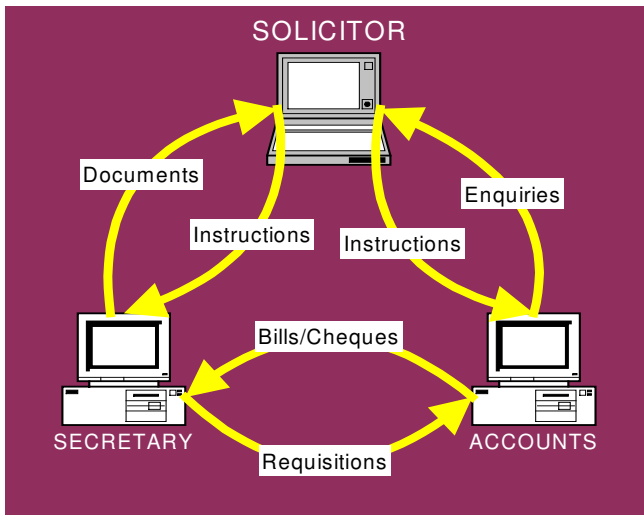
the degree of damage it causes on the computer is relatively mild, the amount of time spent on rectifying the problem can be quite costly to a firm in downtime.

The Keyhouse networks division were able to respond to this virus attack quickly by informing our clients of the virus and providing them with updated antivirus software. This is a standard procedure, which is used when Keyhouse is alerted of any new virus. Implementing a good antivirus strategy and procedure is essential in light of the ever-increasing threat of new viruses.

A good network supplier should be providing this service as part of their standard support and it should be constantly monitored so that the service keeps up to date with the new viruses. If you are interested in receiving more information about this contact us at [sales@keyhouse.ie](mailto:sales@keyhouse.ie) or 01-2040020.

# *At your service...*

The **Keyhouse LawOffice**. A comprehensive, reliable, straightforward software suite that helps you deliver results. It is designed to facilitate all the management and administration aspects of a case - be it money, time sheets, documents, emails, faxes, cheques, diaries, billing.



- Accounts (SAM3.4)
- Bill Drafting
- Cheque Requisitions
- Time Recording
- File Manager (physical file tracking, deeds, wills etc)
- Case Management (includes Case Plans and Precedents)
- Computer Networks

Your Information Technology (IT) infrastructure is critical to the success of the continuing operation of your Practice Management system. At Keyhouse we have a network division which provide all the hardware, network and communications resources for your firm.

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