

LegalWEB2.0

EDITED BY STEVE MATTHEWS

Here, There and Everywhere: Web-Based Tools for Managing Nonbillable Projects

ERIK MAZZONE | Web-based project management software provides a one-stop repository for all the essential information you need to do a job right—and the software provides various tools to make that possible, even easy. Why not try some to organize those projects that keep getting buried in your haystack of to-dos?

“It was the best of times, it was the worst of times.”

I’m not sure what Dickens was referring to when he penned that famous line (though I do have an enduring memory of Cliff Claven from the old TV show *Cheers* remarking, “That Dickens guy liked to cover his butt, didn’t he?”); still, I’m pretty sure Dickens’ sentiment applies to the state of project management in most law firms.

To be clear, we’re not talking about client projects here. Most lawyers tend to manage their client files with an attention to detail and rigor that borders on obsession. Whether papered or paperless, transactional or litigation, big firm or small, lawyers usually curate their client files with care. And often

we use practice management software to help ensure that all the associated tasks are handled properly.

On the other hand, for our nonbillable projects (leasing new equipment, moving to another office space, planning a marketing campaign or the like) we tend to abandon our helpful software and organizational systems, leaving our nonbillable projects to devolve into a haystack of sticky notes and half-filled legal pads. The result is the needles of critical information get buried within. Few would argue that our non-client projects are so unimportant as to warrant this second-class treatment, but in the absence of better project management tools for these types of jobs, the nonbillable work slouches toward disorganization.

Well, it doesn’t have to be this way.

With the inexorable rise of the Internet, a variety of tools to help efficiently manage projects have become more accessible, easier to use and less expensive than ever. While these tools vary in their features and inter-

faces, essentially Web-based project management software is designed to serve as a central repository for all the critical information related to a given project, enabling you and your team to work together on the project from anywhere, anytime. And they all share some common DNA, so let’s take a look their core benefits.

Message Lists

The message list serves as the heart of any project that has more than one person working on it. Functioning like a discussion board, the message list replaces individual e-mail inboxes as the central spot where users’ digital conversations about a project take place. Users are freed from the bother of saving project-related messages in their individual e-mail folders, and they can rest easy knowing that all exchanged messages will be saved and accessible in the main online project space.

Messages can be tagged with customized labels, too, to create the ability to sort and parse data on long-running projects with lots of communications.

Integrated Calendars

Most projects carry their own set of deadlines, so many of these software suites come bundled with an integrated calendar on which to place project deadlines. Thus, centralized deadlines can be calendared once for all users without the worry of some

Web 2.0 column editor Steve Matthews is principal of Stem Legal Web Enterprises. If you have topics to suggest, contact him at steve@stemlegal.com.

LEGAL WEB 2.0

Continued from page 21

users forgetting or missing deadlines owing to transcription errors.

These integrated calendars operate on the widely used iCalendar standard, which means users can subscribe to the project calendar and have deadlines automatically pumped into their main calendar, as long as that calendar supports iCalendar. Microsoft Outlook, Apple's iCal, Mozilla Calendar and Google Calendar all support iCalendar.

To-Do Lists

A project wouldn't be a project if it didn't have a list of things for people to do. So, complementing the message list and calendar functions,

project management software also contains a multiuser to-do list function. Most of the software suites support multiple to-do lists within each project, so that, for example, an office relocation project might include a "things to buy" list, a "people to notify" list and so on. To-dos can be assigned to other users (or oneself) and set with deadlines attached to them.

Plus, completed to-dos can be kept and archived within the software, so you can easily and accurately maintain a record of what has already been done as well as what has yet to be completed.

File Storage

For those ready to step bravely into an increasingly digital workplace, most

Web-based project management software also comes with the ability to upload and store files into the online workspace. Whether they be spreadsheets, Word files or scanned copies of estimates from service providers, handwritten notes regarding a project, sketches of office or brochure designs or the like, uploading them makes these files accessible to whichever users the project manager chooses. It also reduces the time otherwise lost when project users have to search to find in whose control this information is stored.

Access Control

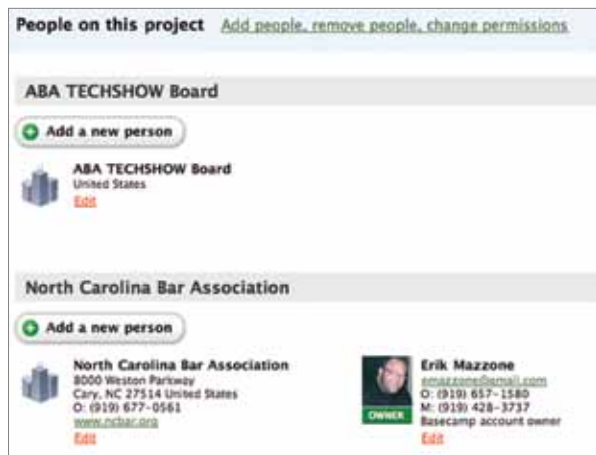
If the heart of Web-based project management is the message list, then the brain is the access control or permissions center. This is the place in each project repository where the project manager decides who is allowed access to the project and to what degree. Centralizing and clarifying permissions not only limits the possibility of accidental deletion of mission-critical data, it also enables the project manager to shield key data from being accessed by prying eyes or modified by unauthorized team members.

Web-Based Application Options

Okay, so you are convinced that this project management software is worth taking a look at, but you aren't sure where to start. There are a number of Web-based options to check out. It's kind of like choosing between a Mac and a PC, in that different options and functionalities will appeal to different users, based on how they intend to use it as well as their available budget. Fortunately, most Web-based project management applications have a free trial or a "lite" version that provides perpetual access,



Web-based project management software like Basecamp can help make critical to-dos and contact information easy to find and easy to share.



although the free versions, of course, are typically missing a few features available in the paid versions.

To guide your decision making, check into these popular ones:

■ **Basecamp by 37 Signals** (www.basecamp.com) is the 800-pound gorilla in this space. Basecamp has a free version that allows users to manage one project at a time, and then prices go up from there.

■ **Teamwork Project Manager** (www.teamworkpm.net) is similar in look and feel to Basecamp and provides some additional features such as time

tracking. There's a free version for up to two projects. For more, various paying plans are available (starting at \$12 per month for a "personal" plan).

■ **Central Desktop** (www.centraldesktop.com) is another popular Web-based option that is widely used across a variety of industries. At higher pricing levels, Central Desktop also includes some very nice features such as integrated Web meetings and conferencing support.

■ **DeskAway** (<http://deskaway.com>) and **GoPlan** (<http://goplanapp.com>) both have free plans for one

project and also provide well-priced options that are worth a look.

So the next time you have an important nonbillable project to manage in your firm, give one of these software programs a try. You may find that it turns the worst of times into the best of times. Dickens would be proud. LP

Erik Mazzone (emazzone@ncbar.org) is Director of the Center for Practice Management at the North Carolina Bar Association. A member of the ABA TECHSHOW Planning Board, he also runs the blog LawPracticeMatters.com.

"Here, There and Everywhere: Web-Based Tools for Managing Nonbillable Projects" by Erik Mazzone, published in *Law Practice*, November/December 2010, Volume 36, No. 6. © American Bar Association. Reprinted with permission. This information or any portion thereof may not be copied or disseminated in any form or by any means or downloaded or stored in an electronic database or retrieval system without the express written consent of the American Bar Association.