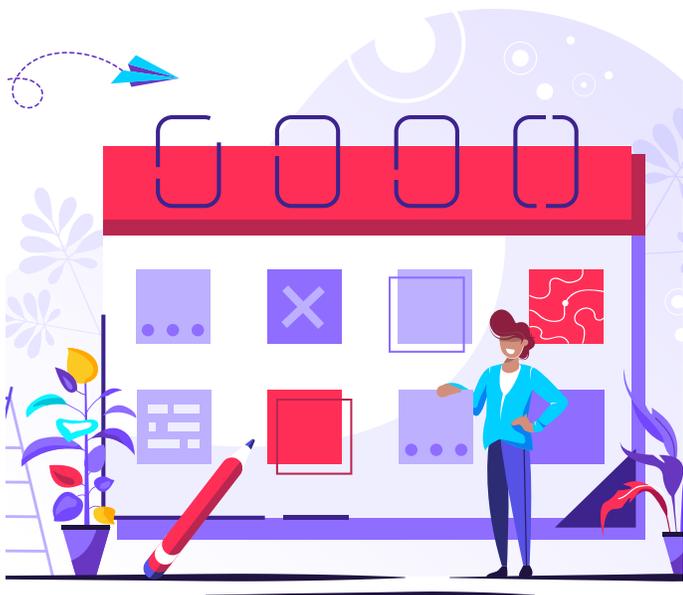


# Creating a Common Calendaring System

By Joseph Pastino



**Calendar and docket management is an organizational hurdle for law firms of any size and requires a sophisticated platform capable of processing, tracking and disseminating vast quantities of information to multiple users.**

To implement such a platform requires collaboration on three distinct phases — the planning phase, the development phase and the production phase. But what are the key benefits of having a common calendaring system in place? Let's look at the benefits of implementing and maintaining such a system.

## THREE PHASES OF A CALENDARING PROJECT

**Planning Phase:** Your first step is to prepare a requirements document that explains the scope of the project and clearly outlines the necessary parameters. Some elements you may wish to consider include:

- Client reporting is a balancing act between sharing important information without overwhelming clients. Be sure to discuss this thoroughly with your clients and send sample reports that highlight different reporting conventions.
- Review data management requirements carefully to ensure continuity of operations as well as compliance with all applicable laws and regulations.

- Decide who will have access and define their roles. You should limit access to only those who need it.
- Use common terminology to eliminate confusion among the users.
- The system layout should be user-friendly and compatible across multiple practice groups because this will reduce training time, reduce data management errors and increase employee efficiency.

This requirements document is your blueprint for success, so be meticulous when preparing it.

**Development Phase:** With the requirements document complete, you can now move on to developing the common calendaring system. The examples below highlight the soft side of the development phase:

- Be in constant communication with the technology professionals who are building the system. Make sure you are an excellent communicator and ask for clarification if you do not understand a question or process.
- Be in constant communication with all stakeholders to address any issues that arise, send out frequent updates to all stakeholders and continue to ask for feedback.
- Run tests using a pilot group to ensure the system is working properly. The individuals charged with this task must have superior understanding of the system.

Remember that your primary concerns during this phase are stakeholder communication and system testing.

**Production Phase:** Now it's time to launch the new system. The following elements merit significant consideration during production:

- Identify any data that needs to be migrated into the new system. You should consider archiving older data if you do not need regular access to it.
- Distribute credentials to all users, create login information and make sure each user has a unique password. All users should change their password after their initial login.
- Provide training and development to all users. Consider one-on-one appointments with your users, or hold group training sessions if you work for a large organization.

There are three key benefits to implementing a common calendaring system in your organization — risk management, collaboration opportunities and cost savings.

- Survey and monitor the system for any bugs and make improvements as needed. There is always room for process improvement, so make it point to check in regularly with the users and share their feedback with the appropriate people.

Do not make the mistake of thinking that your work is complete. Technology is constantly evolving, and a successful project manager needs to keep pace with these changes.

### THREE KEY BENEFITS

There are three key benefits to implementing a common calendaring system in your organization — risk management, collaboration opportunities and cost savings. Let's examine each.

**Risk Management:** A common calendaring system allows for uniformity throughout the organization. By moving dates and deadlines off an individual's personal calendar and onto a common platform, an organization ensures that work can continue without interruption in the event of an individual's prolonged absence or if someone leaves or is terminated.

Such a system can also safeguard against malpractice claims because of its built-in redundancies, organization-wide access and ease of use (it makes data management easier and reduces the likelihood of administrative error).

Additionally, a common calendaring system allows for automation of the reporting and notification elements associated with the calendaring process. For example, a common calendaring system can generate reports automatically and alert stakeholders of scheduling changes.

**Collaboration Opportunities:** Implementing a common calendaring system creates a culture of situational awareness within an organization. Everyone has access to the same information and can quickly articulate the important facts of a case. For example, an attorney can conference with a client and report how many depositions took place in a specific case with just a few mouse clicks.

A common calendaring system enhances the communication process because multiple parties — both within and outside of the organization — can share and store information in the

platform. This reduces the chance of the "I was not aware of this" scenario.

Additionally, it provides real-time data that allows organizations to be flexible with their human resources and increases efficiency.

**Cost Savings:** Real-time data creates cost savings because everyone in the organization will know when deadlines are adjourned and when depositions and conferences are rescheduled. This reduces the amount of unnecessary travel and unnecessary office work.

It also prevents redundant coverage for depositions and court conferences because all stakeholders monitor the common calendaring system and can easily identify a double-book situation. Plus, there's an overall decrease in time spent by calendaring professionals because of process improvements one paralegal can handle the schedules of 20 lawyers due to system automation.

The hectic pace of firms means organization is key. And a common calendaring system allows organizations to mitigate risks, improve their workplace culture through collaboration, and reduce overhead by implementing cost saving measures. ■

### ABOUT THE AUTHOR



**Joseph Pastino** is a Litigation Paralegal who oversees calendaring and docket management matters at Tanenbaum Keale LLP. He leads efforts to support the firm's mass tort litigation team, which includes scheduling attorneys for depositions and court conferences along with using case management technologies to organize and maintain client data.

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