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 **LEGAL  
TECH**  
EDITION

Brad Paubel,  
CIO

**Lexicon**  
**HOLISTIC APPROACH  
TO PRACTICE  
MANAGEMENT**

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COVER STORY

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# Lexicon

## HOLISTIC APPROACH TO PRACTICE MANAGEMENT

By Justin Smith

A typical day in the life of a lawyer would ideally entail things like researching legal questions, drafting persuasive arguments, preparing for and taking depositions, devising plans for trials, and negotiating settlements—essentially things lawyers get paid to do. However, lawyers often get caught up performing non-billable administrative tasks such as answering calls, collecting payments, managing client relationships, and tracking time. All of these distract an attorney from core duties and eat into precious billable hours. In most instances, it's due to a lack of dedicated staff to handle every critical function—and when your name is on the door, you do what needs to be done. On top of all of this, law firms have to manage, understand, and maintain digital security protocols given the sensitivity of their client's data. The legal industry has historically been one of the most targeted in the cybercrime world, with bad actors consistently trying to access a firm's sensitive data. The necessity of remote work during the pandemic has emboldened those seeking to harm, with a 100 percent increase in law firm hacking attempts in 2020.



Without going on a hiring spree, outsourcing administrative tasks can be a smart choice for law firms. Companies with expertise in servicing law firms can significantly help streamline processes, while support services can deliver an enhanced client experience, keep data secure and produce a healthier bottom line. This describes Lexicon, a legal services and technology company—and the only practice management software provider offering a full suite of support services. The company's mission is to enable law firms to focus on what they do best—practicing law.

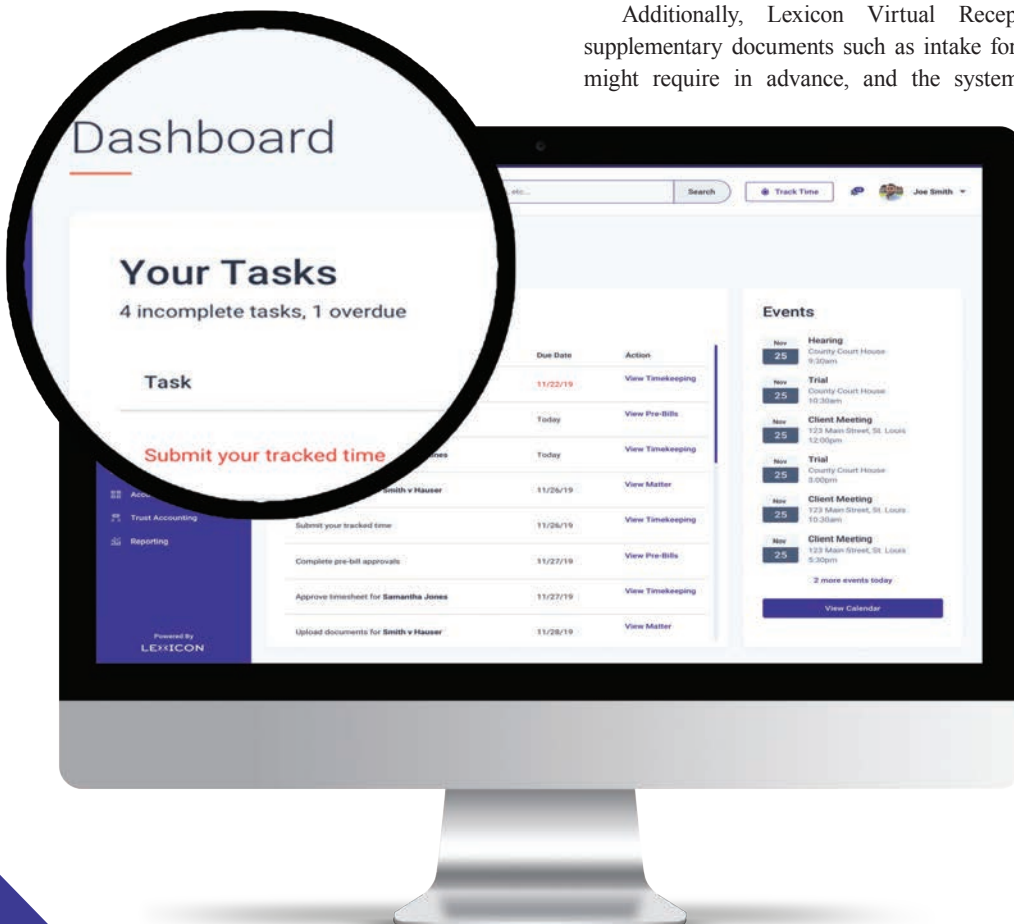
To reduce the administrative burden on law firms, Lexicon offers a robust and intuitive SaaS-based practice management software that provides a unified approach to an optimized practice. Many features that other practice management providers either do not include or charge extra for come standard in the basic Lexicon software package, bringing together document management, electronic pre-bill review, invoice generation, credit card processing, calendar integration, reporting, timekeeping, security and client and matter management. "We offer a holistic solution for law firms, and our base product alone replicates the functionality they currently get from multiple providers," says Scott Brennan, CEO at Lexicon. Just as important, as the client progresses in their journey, the company seamlessly offers services that tie into the software, supporting continued growth.

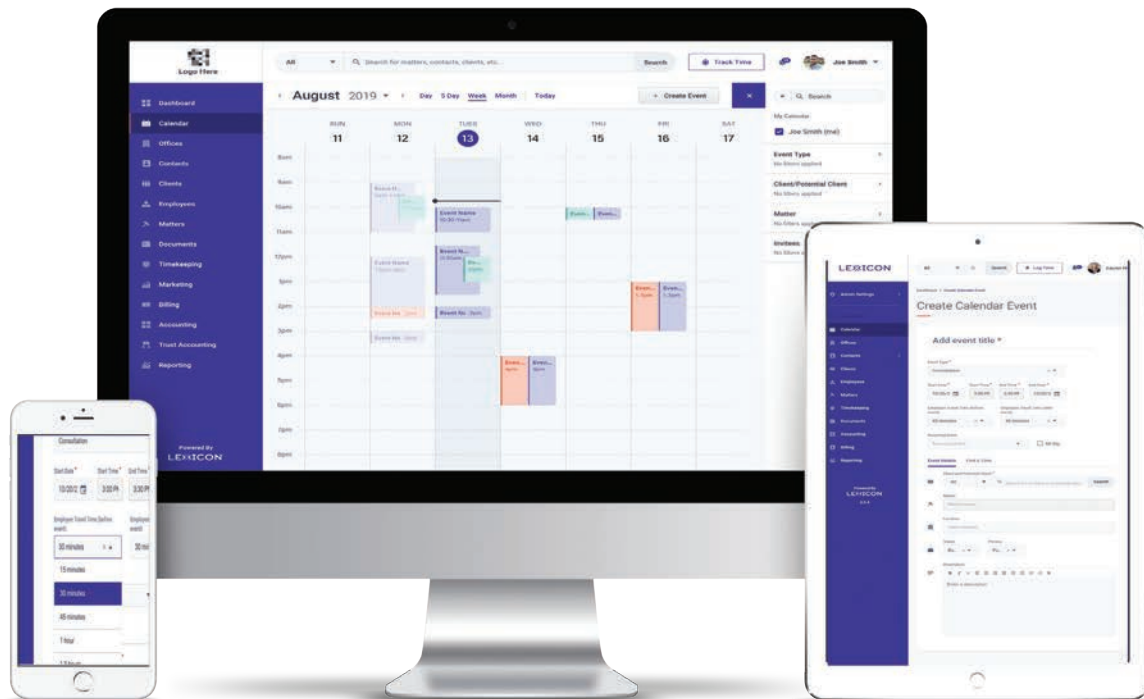
## Tools for the Trade

Lexicon is not one-size-fits-all. Instead, it first understands the client's business goals before identifying services to improve their practice. "Through the knowledge gained from utilizing the Lexicon software, clients have a greater understanding of their business processes. Lexicon then runs results against our internal best practice playbook to come up with recommendations for them," says Brad Paubel, CIO at Lexicon.

With its deep expertise in the legal industry, Lexicon helps its clients eliminate inefficient back-end processes and pinpoints outsourcing opportunities to save additional dollars and improve client satisfaction. "We can reduce the infrastructure cost for our clients by showing them where smart outsourcing of non-essential tasks can actually drive a significant cost decrease for them, helping them increase their net income without increasing their workload," Brennan. For instance, Lexicon Virtual Receptionist will take client calls, schedule client appointments, transfer calls to the appropriate party or act as a branded message service. Utilizing Lexicon software, the receptionist can view an attorney's calendar and areas of specialization, then subsequently follow the workflow rules that the firm has in place regarding scheduling. This results in a hassle-free scheduling experience that can lead to improved client satisfaction.

Additionally, Lexicon Virtual Receptionists can send supplementary documents such as intake forms that an attorney might require in advance, and the system then stores client





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responses in Lexicon's document management system (DMS). With it, attorneys have everything they need at their fingertips before the scheduled client meeting. "No other solution provider offers the level of interoperability between call center support, a document management system, and a practice management system like Lexicon," says Brennan.

Along the same lines, Lexicon offers its services in accounting and billing, marketing, legal operations and quality, facilities, human resources and recruiting, succession and acquisition consulting, and many other areas to help law firms and attorneys focus on their core competencies and achieve desired business outcomes. Moreover, in their St. Louis, Missouri headquarters, Lexicon also provides clients, organizations and students access to their mock courtrooms, a complete event space, a podcast studio as well as additional audio-visual production capabilities to help with any streaming needs

including town halls, webinars and presentations.

Here's a real-world example that Lexicon works: Brennan shares a customer success story of a law firm that desired to expand geographically. The law firm leveraged Lexicon's services for almost all of their non-billable administrative tasks to improve the capabilities and efficiencies of their processes. Lexicon managed their marketing campaigns, call scheduling, and several other tasks, helping the client grow from ten to more than 100 offices.

### **Moving the Needle on Innovation**

In the ever-evolving technology landscape, Lexicon has developed its cloud-based practice management software in such a way that it can incorporate any additional changes for future requirements. "Our platform allows law firms to integrate and collect information from different areas to better manage their business while maintaining an impeccable security posture. And we are always thinking one step ahead, so as a firm grows, needs arise or the industry shifts, we are poised to keep up," states Paubel.

Currently, Lexicon offers an emerging tier of its practice management software and plans to introduce the full enterprise version with a triple hierarchy system—geographic hierarchy, organization hierarchy, and practice area hierarchy—by the end of this year. Additionally, through partnerships and acquisitions in the legal tech space, the company plans to bring even more innovative solutions into its system. "Our vision is to help lawyers concentrate on what's critical to them, which is the practice of law and differentiating themselves in the marketplace, while we handle all the other administrative tasks," concludes Brennan. [CR](#)

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## Lexicon



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*The annual listing of 10 companies that are at the forefront of  
providing Legal Tech services and transforming businesses*