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Practice Management Software Improves in Affordability, Features

By: **Attorney Todd Cheesman**

What causes you headaches and doesn't earn you money? It's probably dealing with the practice side of your law practice, such as managing the influx of information to your office: phone messages, email, faxes, word processing documents, keeping track of billable time, calendaring, managing contact information and the like.

Now, think of a way to save each attorney in your office 20-30 minutes a day wasted time dealing with these issues. Practice Management (PM) Software is a tool to let your entire office streamline all of the information that comes in or is produced in your office. Every client, every case, every issue—accessible in seconds by anyone who needs it. It should not be surprising to learn that PM Software can save even a small firm tens of thousands of dollars a year in lost billable time.



The reason for this is that it can:

- Automate regular, mundane tasks;
- Give you immediate access to any information you need;
- Maintain calendar and task list for entire staff;
- Quickly and effortlessly check for potential conflicts;
- Reduce potential liability by allowing you to stay on top of your cases;
- Reduce the risk of losing documents;
- Save time by virtually eliminating duplication of work;
- Synchronize with other software like PDA, laptop and billing software;

- View all work done on a file with a single mouse click;
- Warn of upcoming deadlines, statutes of limitation and work remaining on a case.

In short, PM Software can help you handle more cases, be better organized, better prepared, more responsive, have better communication with your clients and achieve better results at trial.

PM Software has come a long way from the rudimentary applications of just five years ago, so if you haven't used it lately, you're probably in for a surprise. And it doesn't matter the size of your practice or your specialty. While there is no application that is right for every firm, there is one that is best for you. The key is to match your particular needs and the strengths of each application. This article is intended to help provide you guidelines to get started in selecting the application that is best for you.

Features of Good Practice Management Software

The law firm with effective practice management will see information flow effortlessly throughout the firm. One-time entry of information combined with remote and local access to documents mean less wasted time and greater job satisfaction. Attorneys can devote more time and energy to their clients and less time to finding documents or finding staff to find documents or having documents delivered to them.

A fully integrated mobile practice management system should support calendaring, task management, e-mail, contacts management, document assembly, document management, case information, financial information, forms generation, and time and billing from both remote and office locations. To effectively manage the firm and not just the case, consider a system that has financial management integrated with practice management.

As a general rule, practice management software packages usually have several main features.

- **Automation:** repeated and similar tasks can be performed in a fraction of the time by using automation and form tools.
- **Calendaring and Task Management:** track appointments and deadlines, calculate calendar dates, schedule appointments and meetings.
- **Case Database:** access all data on your cases and matters from a single relational database.
- **Checklists:** all of the steps in handling a case, including interviews, document collection, analysis, and filings ensure that everything is done in order and on time.
- **Communications:** immediate access to any information you need including all communications (e.g., phone calls and emails) between staff and clients on specific cases with logs of times and conversation notes instantly available.
- **Conflict Checking:** check names for potential conflicts.
- **Contact Management:** Organize information on all of your contacts (e.g., clients, opposing counsel, courts).

- **Document Assembly and Management:** assemble key documents from checklists, thus reducing time spent duplicating documents, reducing the risk of misspelled or incorrect names.
- **E-mail Management:** Most practice managers can attach e-mails into your client files and can synchronize with Outlook and other popular e-mail utilities, allowing you to attach incoming e-mails to client files.
- **Research:** conduct and integrate legal research with case files.
- **Time and Billing:** create chronologies of work performed on each case, time spent and costs incurred.

Choosing the Right Product for Your Firm

Below is a quick checklist of considerations when choosing the software that best fits your needs. The American Bar Association also has a useful resource for helping you select the software that's best for you at: <http://www.abanet.org/tech/ltrc/fyidocs/techselectcheckfyi.html>.

You should always consider:

- Ease of use.
- The specific features your firm needs.
- Price. Price means "total" price (with all the bells and whistles you actually need). Many PMs have low initial pricing, but when you add important features like additional users, document assembly, integration and network modules the price jumps up. Also important is the company's return policy.
- Training and technical support.
- Hardware. You need to make sure that your hardware is compatible with the software you choose.
- Software: What other software do you use and what have you decided you need to keep? If you are not starting from scratch, you need to ensure that any Practice Manager you get integrates into your existing infrastructure.
- Regular upgrades without downtime, new software, or new equipment.
- Flexibility & Customization.
- Portability (ability to use in remote locations).
- Company reputation – What do other users say about this program and what is being used by colleagues in firms of similar size and practice areas?
- Most Practice Managers have different versions. Make sure to see what each version can do, the type of hardware and software required and the number of users for which it is recommended.

Tips on Implementation

Write out an implementation plan with all of the functions you need. Once you decide which functions you must have as opposed to those which would simply be nice, look at the features of the software you are considering and learn firsthand how they work. Consider your current hardware and software already in place. Analyze your current technology and determine whether the specifications of the practice manager you are considering will fit into your current technology path.

Most Practice Managers have demo versions that at least allow you to see what the interface looks like. Many allow limited functionality and video tours. For larger firms, you can request demonstrations or limited installations to test functionality.

Regardless of the size of your firm, your best bet is to find a good consultant who has worked with the programs you are considering and get a recommendation for the software that best fits your practice. This will be money well spent.

One Caveat

Law firms often underestimate what it takes to implement a computerized practice management system. There is a significant investment in dollars and time required. If properly implemented, the payback and return on investment can be enormous. However, not all firms are successful in their Practice Management implementations.

Three things will help you overcome this hurdle:

- Proper training from a certified consultant or trainer for everyone in your office.
- Proper buy-in from everyone. The way you do this is to educate your firm that this system will help save time, make more money and deliver legal services more efficiently.
- Allow the transition to take a little time. Be patient. It might take quite some time for the firm members to completely learn the various parts of the systems.

Conclusion

Again, all of these comments are generalities. You should carefully study your individual situation prior to choosing your practice management solution. Your true cost is not the few hundred or thousand dollars for a product. The true expense is in the conversion, adaptation, and training. If the system fails, you must add the lost billable time.

Practice management software allows you to have all the firm's client information at your fingertips—no more searching for the file. Client service is enhanced by all your people having the information quickly available to them. With information only being entered once, consistency and accuracy are increased; you can bill for time you previously weren't billing for and your overhead costs can decrease. This translates to reduced costs, higher profit, less stress, more organization, happier clients and less liability exposure.

* This fall, a company called PCSecretary, of which the author is a principal, plans to launch a

Practice Management application aimed at serving small to mid-sized law firms.

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PM Software: A Shopper's Guide by Size of Law Firm

Options for Different Size Law Firms

When selecting PM software, there is no one solution for everyone; what works for another firm may not be the best solution for yours. Before you make the PM plunge, you need to do your homework and decide what your firm truly does and does not need.

Choices for Small Firms/Solos

All firms can benefit from practice management. The options available to today's smaller firms are more robust than ever. Accounting and billing, automation and forms, document assembly and management, remote access, fuzzy logic data searching—all in one program and easy enough for even a technophobic lawyer to use.

Here are some choices currently* on the market:

Where to Start

- AbacusLaw, www.abacuslaw.com
- Amicus Attorney, www.amicusattorney.com
- PCLaw, www.pclaw.com
- Practice Master (formerly Case Master), www.practicemaster.com
- Time Matters, www.timematters.com.

Other Applications

Some other contenders worth considering:

- Client Profiles, www.clientprofiles.com
- LawBase, www.lawbase.com
- LegalEdge, www.legaledge.com
- LegalFiles, LegalFiles Inc., www.legalfiles.com
- Needles, www.needleslaw.com

- PerfectLaw, PerfectLaw Software, www.perfectlaw.com
- ProLaw Ready, ProLaw Software/Thomson West, www.prolaw.com
- RealLegal PracticeManager www.reallegal.com

For this class of firms, there also are some practice-specific practice managers that you can find online at Lawyer's Weekly Technology Directory: <http://www.lawyersweeklyusa.com/techguide.cfm>.

Mid-sized Firms

Like smaller practices, mid-sized firms need to find documents and track data for client files. However, mid-sized firms also need to be able to coordinate the efforts of multiple lawyers or multiple staffers collaborating on projects. These firms demand more sophisticated conflict checking, document management and calendaring features and require more software customization ability.

With these needs in mind, some of the better performers are:

- Client Profiles, www.clientprofiles.com
- Omega Legal, www.omegalegal.com
- Perfect Practice, www.perfectpractice.com
- ProLaw, www.prolaw.com
- TrialWorks, www.lawex.com.

Large Firms

Larger firms have more advanced communication and real-time data administration needs. A firm with offices around the country and perhaps around the world demands dynamic communication functions as well as online collaboration tools and the ability to handle multiple remote users. Flexibility, customization and portability for the larger firm represent unique challenges that many applications simply can't handle. Therefore, some of the better applications for larger firms are:

- Aderant (formerly Solution 6's CMS Open), www.aderant.com
 - Lawbase (Synaptec Software Inc.), Mitratch and ProLaw from ProLaw Software Inc.)
 - Legal Files Software Inc.'s Legal Files, www.legalfiles.com
 - RealLegal Practice Manager, www.reallegal.com
 - Solutions In Software Inc.'s CaseManagerPro, www.casemanagerpro.com
 - Thomson Elite, www.elite.com
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