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A Law Firm's Guide to Matter Management Systems

developers · Wednesday, May 18th, 2022

Your law firm's [matter management systems](#) matter. In fact, they're the lifeblood of your law firm.

It's taxing to try to maintain multiple manual systems to track all of the details about your law practice. Why subscribe to several platforms to manage different aspects of a matter — from [document management](#) to practice management and client intake solutions — when you could just pay for one that can do it all? Why risk noncompliance with a time-consuming, manual approach to tracking all of your case details and documents?

Why not look to tech to help achieve [operational efficiency](#) by moving to an all-inclusive legal technology platform?

The future of the legal industry lies squarely in innovative tech solutions that integrate matter data with essential [client intake](#), client service, [billing](#), and [legal operations](#) details. Upgrading your firm's matter management systems will help your firm keep humming along — and we don't mean that annoying buzz in your head from constant worrying about what work hasn't been done or what information you don't have at your fingertips.

So, where should you get started? Fortunately, this guide on matter management systems can walk you through the benefits of matter management and help you start moving forward to improve your practice.

What is matter management?

Put simply, matter management is overseeing all of the business processes of a law firm for individual matters. It may sound straightforward, but it's anything but.

Matter management encompasses the ways that your law firm reviews, tracks, and administers data, documents, emails, meetings, tasks, all-important deadlines, statutes of limitations, filing requirements, client records, [billing](#), [financials](#), and more for each and every matter. It involves managing both internal and external processes and information.

Your firm's matter management systems track each aspect of the lifecycle of a matter. For example, your firm's matter management system might track a complex legal case with multiple parties and claims, keeping track of expert witnesses and filing deadlines. If your firm has multiple practice areas, your [matter management system](#) might also analyze the productivity of various practice groups and which matters have the most time billed and by whom.

In essence, matter management solutions keep a finger on the pulse of your firm and ensure it remains steady.

Why does my firm need a matter management system?

Effective legal technology solutions, including legal matter management software, are crucial to every law office. There is no other way to sift through and manage the chaos. The more time you spend integrating and updating your firm's matter management processes, the less sifting through spreadsheets and stacks of paper you'll have to do. Your [legal operations professionals](#) can leverage matter management software to streamline almost every aspect of the firm and allow your lawyers to get back to lawyering.

A firm may bring in hundreds or even thousands of new cases every year. Your legal operations teams need to have the tools to properly manage those matters, and your lawyers must be able to keep track of the intricacies of them all. It sounds like a lot, and it is. Proper matter management might be the most important function of your law firm: it's how your firm stays afloat.

Imagine an integrated digital workspace where your legal operations professionals can run the firm's daily operations, manage matters and projects, and collaborate seamlessly across practice groups and clients. The good news is that this [magical digital wonderland exists](#).

While this guide focuses on matter management systems, it's important to also consider your firm's [case management systems](#) and how technology might help you optimize them too.

Our recommendation? A [comprehensive, one-stop-shop technology solution](#) that can handle it all.

What features and capabilities should I look for in matter management software?

If you're looking for a way to simplify your team's workload and handle your firm's matters more efficiently, we've got you covered. Managing the lifecycle of a matter in a single, integrated system is the key to suffering fewer headaches while searching for information as well as less duplicative data entry. We recommend streamlining operations by moving to a technology solution with a range of dynamic capabilities so it will become your firm's single source of truth.

Enhanced collaboration and knowledge sharing

Your law firm is a team, and legal teams work best when they're able to collaborate seamlessly. Your matter management system should work to enhance teamwork and eliminate friction in communication.

Features like shared task lists and comprehensive [calendar](#) systems boost organization and make sure your lawyers never miss another deadline. It's especially helpful when your matter management system seamlessly integrates with your calendar continuously, such as with [Microsoft 365](#), so you're always on top of your schedule. And the most advanced systems can automatically populate deadlines in your calendar based on court rules. All you have to do is choose your jurisdiction, and your deadlines will appear on the appropriate date.

Additionally, matter management software can make it easier for legal professionals in your firm and corporate legal departments to collaborate on legal documents by providing access to [shared](#)

[documents](#) with the ability to review and compare previous drafts. These features and more, like keeping track of the contact information for all parties, make working with outside counsel and other external partners more effortless and faster.

Some platforms also reduce the tedium of your email inbox with chat features. Real-time conversations help you get work done faster because you can get answers to pressing questions or immediate feedback on the work you're doing. To make sure your team members are up to date, you can mention them and send an immediate pop-up notification. You can also keep track of your conversations by matter rather than going on an endless hunt for the needle in the haystack of your inbox.

Increased visibility through comprehensive reporting

Your matter management tech should do more than just track billable hours and generate invoices. It should also create comprehensive, usable [reports](#) to give you critical insights into the functioning of your law firm.

The alternative is sorting through spreadsheets and hundreds of emails from various timekeepers and case files to locate essential data, reconcile gaps and inconsistencies, and then manually create reports, which will cost you both time and money. [Reports](#) generated in your matter management system make it easy for your firm to break down spending, gaining visibility into each legal practice area and individual biller. With this information, your business team can analyze budgets, set realistic pricing, and forecast future needs. More reporting through an integrated matter management system means greater access to data and gives you deeper insights into the health of your firm.

Improved savings in costs and time

Time is money, and at law firms, this saying proves even truer. The minutes that [timekeepers](#) spend on time-consuming administrative tasks are minutes they aren't spending on valuable client matters.

By centralizing your firm's matter management system, your lawyers can access the documents and information they need more quickly and efficiently, serving both your clients' purposes and your firm's bottom line. A better matter management system allows your firm to track filing deadlines and statutes of limitations, helping you meet deadlines as well as avoid malpractice claims and compliance risks. Automated reminders about impending filing deadlines sure beat those sticky notes that are likely to get buried on your desk or fall off your computer.

Tech also allows your law firm to manage all types of costs proactively. When you centralize matter data, you improve your visibility into your workload as well as your costs. And you can wind up optimizing the allocation of your resources, which can help you save your clients — and your firm — money.

Effective matter delegation

Your law firm has a lot of moving parts. Matter management software will help you keep track of those parts by assisting in effectively delegating and keeping track of those delegations, both internal and external.

You can create cross-functional workflows within your matter management system to assign tasks to your team members, including other lawyers, paralegals, service providers, and outside counsel, thus increasing efficiency and reducing the possibility of errors. The right software can help your firm oversee any external stakeholders working on a case, such as local counsel or expert witnesses. And general counsel will really enjoy the real-time visibility they have into matters and their timelines and budgets as well, improving their client experience.

Increased security

Your law firm has an ethical obligation to protect client data and numerous incentives to protect its own. Firms considering a cloud-based matter management system for the first time may feel some trepidation — **it's a big transition, with lots of moving parts to coordinate.**

The long and short of it is that cloud-based matter management systems offer your law firm improved security and compliance practices for both data and document handling because that's their key focus. However, not all cloud-based legal service providers are created equal.

When choosing a **cloud-based solution for matter management**, look for a variety of features, including physical security measures, certifications, disaster recovery and business continuity plans, user authentication and authorization, infrastructure security, and data ownership. Although you won't be able to see all of these security features, they'll be vigilantly safeguarding your firm against threats every minute of every day.

Stronger automation and more streamlined workflows

Sound matter management tech will give your firm the gift of **automation** so you don't need to keep reinventing the wheel. This is particularly helpful when it comes to opening and managing matters. Without a standardized template, it's hard for a law practice to both establish and enforce matter standardization, which is the linchpin of enhanced efficiency.

With an integrated matter management system, your firm's administrator won't need to manually move data between systems, reducing the risk of human error. Tech will help to automate matters from open through close and can automatically assign or complete tasks for you while also keeping information up to date using a workflow system (and freeing up your lawyers for billable activities). It's also easy to keep clients in the loop with automatic updates. Automation in matter management is your friend.

How can my law firm get started with matter management?

Lacking a reliable matter management solution can have a ripple effect throughout a matter's lifecycle — and the profitability and productivity of your timekeepers and the entire firm. That's why it's important to start putting the proper systems in place to open matters effectively and track them throughout their lifecycle with customized reporting.

Centerbase matter management puts everything you need to know about every matter at the touch of a button. And what's better is that you'll be able to stop worrying about details that you're forgetting or those sticky notes cluttering your desk with tidbits of information. Not only will a comprehensive matter management system like Centerbase serve both your firm's and your clients' needs, but it will also help you get out of the office in time for dinner and help you get a better night's sleep.

In short, [Centerbase](#) can help your law firm reach its full potential with better matter management — with just one simple move to a comprehensive, easy-to-use technology solution. Sign up for a [free demo](#) on our legal matter management software and learn more about how [Centerbase](#) can help you streamline your firm's operations.

This entry was posted on Wednesday, May 18th, 2022 at 12:00 am and is filed under [Practice Management](#)

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