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## Matter Management vs. Case Management: Are They the Same or Different?

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Legal technology is great, but it can feel overwhelming for lawyers who aren't sure how to [maximize the benefit](#) of the features of the software — especially those who are more comfortable storing their information in Excel spreadsheets or in Microsoft Outlook.

If you're new to legal practice management software, you may have noticed that you can manage almost everything under the sun. With features to oversee everything from employee productivity to client satisfaction, you can also manage individual cases and matters as they relate to certain employees or the law office as a whole.

With all the ways to collect metrics and analyze case information, you may be left wondering what's the difference between them all? One of the most common questions is the difference between case management and [matter management](#) solutions and the benefits your law firm can derive from them.

### Are matter management and case management the same?

Matter management and case management are not the same thing, but they're related. Many people are confused by these two terms because they're used interchangeably. After all, sometimes lawyers refer to cases as matters and vice versa.

It's easiest to think of these two concepts as an umbrella. A law practice's business is made up of individual clients who have cases that form the bulk of the work. Lawyers and staff manage these clients and cases on a micro level, keeping track of the discovery, communications, and billables per case and client. But the cases exist under the security of the larger umbrella.

Matter management is the larger umbrella. It governs the practices and processes that makeup case management and the business of the law firm relating to a particular case or client (or set of cases and clients). It is more complex and higher-level than case management because it involves more moving parts.

### What is matter management?

Matter management is overseeing the business processes of the law firm for individual cases. It involves managing both external and internal processes. Law firms can also use matter management to manage complex litigation with multiple clients and related cases progressing

simultaneously.

For law firms with multiple practice areas, matter management may include analyzing the productivity of multiple lawyers working in particular practice areas or the billable hours spent on certain types of cases. It can also involve tracking budgetary and financial metrics by practice area or by cases with a similar feature. Matter management gives partners the opportunity to review spending and productivity-related to a matter as a whole and the impact that it has on law firm resources.

Legal matter management isn't just about tracking internal processes but also managing external processes as well. It often involves overseeing any external providers working on a case, like expert witnesses or local counsel. This can mean assigning internal and external lawyers and administrative staff to cases and specific tasks and examining the overall operational efficiency of the case management process.

When a matter management system is used to manage complex litigation, multiple attorneys can upload their legal documents, work products, and data into the cloud-based system so that they can review and download documents from anywhere. Plus, the system serves a useful project management function because each contributor can see the work that their colleagues have completed in real-time through task lists and collaborative features, like a comprehensive calendaring system.

## **What is case management?**

Case management is managing everything that relates to the lifecycle of a particular legal case or client. It is internally focused and is more about the processes of managing a case than the implications that the case has for the larger business of the law firm.

Think of a case management system as a single source of truth for a digital case file. Legal case management software usually includes managing appointments and court dates for a particular case, storing and organizing documents and discovery, managing client and witness communications in a client portal, time tracking, and billing and invoices for a particular case or client.

Case management is a great way for lawyers to manage cases that involve other attorneys, administrators, and clients but that don't quite rise to the level of complex litigation. Unlike matter management, case management collaboration is more limited to the case at hand rather than a larger matter. It is less of a tool for law firm management because it isn't designed to provide the same high-level insights into workflows related to case management.

## **How can legal operations professionals leverage software to streamline processes?**

Legal operations professionals can leverage practice management software to streamline almost every business process, like billing and payments, metrics reporting, and [client intake](#). Certain key features can also be used to organize workflows related to matter management and case management in several ways.

### **Increase automation**

Increased automation is the number one way that legal technology streamlines legal processes, including those related to matter and case management.

The benefit of automation is that you don't need to recreate the wheel every time you do something. Instead, you can rely on legal technology to do the legwork for you. You also don't need to hire a dedicated employee to perform tasks that can be automated and can rely on the [legal operations team](#) to oversee the use of the technology.

Automation is handy for case and matter management. Instead of having an administrator draft, print, and send out a bill, the software can automatically create an invoice for a case or a matter. Then the technology automatically sends it to the lawyer for editing and then to the client for payment. This process reduces the time that administrative staff spends collecting payments and following up on delinquent accounts.

Legal matter management software and case management solutions are also highly intelligent. They can automate the timekeeping process by detecting billable hours from appointments on a calendar and correspondence sent to a client through the system. This eliminates the time that a lawyer needs to spend tracking billables and inputting data.

For matter management specifically, the software can automatically pull data and generate helpful reports that allow law firm management to keep an eye on the firm's profitability and overall health. This means that stakeholders and timekeepers can spend less time digging around for the right data and metrics and more time being productive.

## **Standardize routine administrative tasks**

Legal technology can also help legal professionals standardize administrative tasks, like invoicing, calendaring, and organizing discovery. Standardizing routine tasks gives your legal team members more time to direct their efforts elsewhere and minimizes human errors made in manual tasks.

While lawyers still need to understand, research, and apply the law, they can lighten their workloads from administrative tasks that are time-consuming when they are standardized by technology.

For example, instead of conducting an in-person client intake, case management software can automate the client intake process and send out standard templates without needing a lawyer or paralegal to set up an appointment. This cuts down on the need to have an intake appointment for every new client, which saves time. It also reduces the need for administrators to print out intake documents, schedule intake appointments, and correspond with the client.

## **Intuitive document management**

Legal technology has revolutionized the processes related to document management, especially for case and matter management.

With legal software, lawyers can upload and organize discovery and documents as part of a case or matter management system. This feature streamlines the discovery process by giving users (including clients) 24/7 access to the documents and incorporates useful features like the ability to search for frequently accessed documents. That means no more sifting through a cluttered desktop or irrelevant discovery when you're only looking for one particular document. It also helps

facilitate a remote work system where employees need to access documents from home.

Case and matter management software also make it easier for teams to collaborate on documents. Lawyers and administrators can review changes and past versions of work products and opt into notifications when documents are accessed by certain parties. This makes follow-up more immediate and keeps the discovery process moving. It also gives clients the ability to upload emails directly into the case management or matter management system, so that they can be easily produced in the future.

Intuitive document management can increase the overall productivity of the law firm by cutting down on time spent managing documents.

## **Comprehensive finance management**

Case management and matter management undeniably play a role in financial management since the revenue stream starts and ends with cases. Legal technology makes it easy for legal operations professionals to streamline financial management practices and implement a comprehensive financial management system.

With the right technology, lawyers can easily track their billables and nonbillables on certain cases and invoicing for a case. Management can then track billables and nonbillable hours on a larger scale as part of their matter management and employee productivity analysis. This provides insights into larger financial trends that may affect the law firm as a whole.

Technology does more than just track hours and generate invoices. It also generates financial reports and can inform management about how a particular case or set of cases is affecting the law firm's bottom line. It helps management track financial trends, allocate resources, and get a picture of the firm's overall financial state. This makes it easier for the firm to stay on top of key performance indicators and achieve long-term financial goals.

## **Look for a tool that offers the best of both worlds**

If you're looking for new ways to simplify your workload and manage all of your cases, you need a better system than Excel spreadsheets and a desk full of clutter. If you're ready to look for a technological solution, look for a matter management and case management system that helps you keep every important detail in one place.

Check out a [free demo](#) so you can see for yourself how Centerbase is the one system to rule all of your case and matter details.

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