centerbase.com

Centerbase CloudBased Law Firm Management & Growth Platform

What Features Do I Need In a Legal Practice Management Software?

developers · Friday, April 24th, 2020

Practice management software vendors tout a multitude of features. But how are you supposed to sift through this sea features to figure out which ones will aid your firm? You're in luck, because I've done the legwork of sifting through features for you. In this article, I will dive into some features you should consider when you're evaluating practice management software. For the sake of word count, I am not going to include billing features in this article.

Before you purchase legal practice management software, it's important to understand the capabilities that most programs offer, so you can weigh each software's strengths when narrowing down your selection.

Here is a list of the most common features found in a legal practice management software platform:

1. Matter management

Matter or case management is the base of any legal practice management software. It's the glue that holds all the matter elements together in the software. In most systems, the matter manager will be your matter dashboard, which provides your staff important fields of information on the case such as Client, Matter Number, Open Date, (Important) Parties and other matter data that you'd like to track easily.

From the matter, you can navigate to all calendar appointments, tasks, documents, emails and parties.

A matter-centric system allows your staff to find all the information they need about a matter in one place. If you put processes in place at your law firm, your staff should know not to save anything matter-related outside of this feature (or program).

2. Firm calendar

A firm calendar helps your staff understand everything that's going on in the office. Firm calendars can include staff calendars as well as resource calendars such as conference rooms.

The firm calendar makes it easier for staff to schedule attorneys' time and if synced with Outlook, can reduce the number of clicks it takes to get a new calendar event updated to everyone's devices.

Finally, if you're using a firm calendar within your practice management software, you should be able to track the matter that each calendar event is related to. This not only helps with filtering and searching the calendar, but also allows you to pull a list of all the calendar events and deadlines associated with a matter.

3. Task management

In the last 12 months, a good amount of software seekers have asked me about task management. When asked, I tell them that the days of Outlook tasks are over.

Firms are starting to see the benefit of having a centralized, matter-centric task management system that allows them to push out tasks to members of their team and see when the tasks are completed. How could they not?

A lot of the practice management software vendors are adding more powerful task management (kanban boards) thanks to popular programs such as Trello and Asana.

Like calendaring, it's nice to be able to see all tasks, across all staff, associated with a matter.

4. Contact management

Contact management (or CRM in other industries) is a funny topic in law firms. This is because many attorneys protect their contact and client lists at all costs and do not want them getting out to other members of the firm.

Having a central "rolodex" helps you in a few different ways:

- You can see how a person is related to all the cases at your firm.
- You can run more complete conflict checks.
- You can segment your lists and do targeted marketing.
- You have all important contact information in one central location that all staff can reference and use.

5. Document management

Every firm tracks documents related to their cases, but there are three different ways I see them do it. Law firms either have a drive on their server with a folder for each matter, keep track of documents in their practice management software, or they have a more powerful document management software (DMS) that they use to track properties, increase searching capabilities, and keep track of versions.

A lot of practice management software will either allow you to host the documents in their system, or connect a cloud-based document repository such as Google Drive/Box/Dropbox or a full-blown DMS such as NetDocuments or iManage.

Overall, you'll want to have your documents connected to the matters in your practice management software because it will allow you to easily access your documents in the same place that you're accessing other matter-related information.

6. Document automation

Document automation features allow you to pull pieces of information you're tracking on a matter directly into a document template, saving you time and reducing the risk of errors (leaving the name of the previous client you used the document for, in the new document).

The main benefit of having document automation features within your practice management software is not having to do duplicate data entry.

If document automation is an important tool to your firm, I'd make sure to speak with the vendor about the exact capabilities the program has to offer. For instance, does their software include an interview format, meaning it has conditional logic to change the number of fields for things like the number of adverse parties or children, or is it a one-to-one translation from the matter fields in the practice management software.

7. Email management

I don't know many people who enjoy reviewing emails in Outlook. It's impossible to do with the number of emails people receive in a single day.

Many legal practice management systems will include a way to save emails from Outlook to a matter. Some will require you to drag the email to a folder that will update their practice management system, BCC a specific address or they'll have a plugin that includes a popup dialog to save the email into the system.

If you're storing emails in your practice management system, it's easy to reference the emails later on without having to dig through your inbox.

Finally, understand how the practice management software stores the email once it's brought into their software. This is important if you're required to produce these emails. Some software will convert the emails to a special format instead of maintaining the MSG format which includes the metadata.

8. Workflow

Workflow automation is one of my favorite features some practice management platforms offer. When you're speaking to a vendor, workflow is another feature you want to make sure you fully understand the capabilities of.

For some vendors, workflow means the ability to create tasks for different members of a firm when the case is opened. For other software vendors, workflow means the ability to complete those tasks automatically, reducing the administrative burden on your law firm.

Some of the ways I've seen workflows used in law firm practice management software are managing client intake, opening new matters, and AR collections.

9. Client portal

A client portal is one of the newest features to be added to this list as most practice management software vendors have only recently added one to their package.

A client portal allows you to collaborate with other parties involved in a case.

Most portals include:

- Access to all matter bills and the ability to pay a bill
- Document sharing/repository capabilities
- Shared calendar or task list
- Secure communication

10. Potential new client tracking

Managing a law firm's potential new clients has become a hot topic for practice management software vendors. Mostly because they want to grow your business to grow their business!

Tracking potential new clients is big for consumer-facing law firms, but if your main practice deals with big corporate clients or insurance defense, it won't be as important.

If I were to walk into a law firm and ask for a list of their prospective clients, most could not quickly produce a list. If you're not keeping a record of your prospects, you're probably not following up with them to close new business.

By tracking your potential clients, you can also begin to track your referral sources and get a true ROI on your marketing efforts.

11. Reporting

Finally, reporting is something you think about when you're reviewing billing software, but it's also important for practice management.

Here are some of the topics my clients run reports on from their legal practice management software:

- Task reporting – due date/completion date
- Deadline report per matter
- Referral sources for holiday lists
- Matter shelf life
- Matter status report

This entry was posted on Friday, April 24th, 2020 at 12:00 am and is filed under Practice Management
You can follow any responses to this entry through the Comments (RSS) feed. Both comments and pings are currently closed.