

Why You Need Practice Management

Practice / Case management programs will handle your calendar, contacts, matters, time-entries, phone messages, etc. It organizes your life, it "thinks" like a lawyer and it is essential.

A. What Practice Management Software Helps You Do:

1. **Manage Your Files:** The most important element of a Practice Management system is file/case/matter management. It is the feature that all PIM's (personal information managers such as ACT!, Goldmine, Outlook, etc.) are missing. Your law practice revolves around your files. The information you have on all your files is seemingly endless. Being able to access all of the information you have about your cases (who is involved, events, tasks, communication, time entries, etc.) immediately is so incredibly valuable to your practice. This same information is also available to everyone in your firm who works on that file. No matter how much you customize your PIM, you will not get matter management.
2. **Manage Your Contacts:** Communication with not only your clients, but with all those who are involved with your firm is key. It is important that information relating to the people in your contact database is consistent, kept up to date, and complete. By training the staff to properly input contact information, you will be able to fax, e-mail, call or communicate in writing with a contact with a minimal amount of effort. Contact information can also be used to do preliminary conflict checking.
3. **Manage Your Calendar:** In the legal world, calendars change all the time. You need a way to manage your calendar, and to manage your calendar as it relates to others in your firm. You need to be able to see calendars with any variation of people and resources, in a day, week or month view, including whatever events you want to see. It is important that the calendar is easily changeable, easy to read and that it is easy to find times when you and others in your firm are available. You also need the ability

to schedule a resource (conference room, library, firm projector, etc.) without having to speak to the receptionist who holds the appointment book for the resource.

4. **Manage your Tasks:** Your day is about prioritizing the endless list of things that need to be done, both for your clients and for your firm. Deadlines are critical, and your case management software should be able to manage a task from the time it is put on the list, until it is billed and ready to send to the accounting system. Often times, your tasks are linked to other tasks. One thing cannot be done until another thing happens. Your case management software needs to be able to link events easily.
5. **Manage Your Time Entries:** It MUST be as easy as it can possibly be to bill for your time. You need to be able to track and manage your time, by seeing how much time you have accumulated for the month, see how much time has been sent to your billing package and see your time sorted by matter. The majority of your billable time comes from appointments, tasks, phone calls and e-mails. A good case management software should help you capture otherwise lost billable time.
6. **Manage Your Communications:** Phone calls, phone messages and e-mails are a regular part of your life. Effectively managing them is the single most important thing to do to improve client satisfaction. Your case management software should allow you easily record and bill for your communications. So much time is lost because of communication that is not recorded manually. Mastering the management of your communication will pay for your case management software and implementation over and over again.
7. **Assemble Documents Quickly:** Creating a document in a law firm is often a fiasco. It usually involves the preparer of the document either racking their brain thinking "who was the last person that had a similar document created like the one that needs to be prepared", only to search for it, do a "save as" and then a "find and replace", or reinventing a document that has already been created by someone else in the firm. Managing the preparation of your documents is a critical time saving feature of case management software. Taking on the project of organizing your most frequently used documents into a template structure, and then creating those documents from within your case management allows you to be sure there is consistency in the documents created in your firm, and since the client information is extracted from your case management software, there is less chance for client information error in the document.
8. **Manage your Research:** Accessing your research provider easily and compiling your firm research into a central location so others in your firm

can have access to the information you have already discovered, will save time and money on legal research. You will also eliminate the need for others to find the same information that has already been catalogued for the firm. The different software programs approach research organization differently.