Top Five Reasons to Use Practice Management Software

Advanced Features

by John Heckman

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Top Five Reasons to Use Practice Management Software — Advanced Features

What exactly does practice management software do? How does it differ from Outlook? Many law firms exploring practice management software for the first time often ask these two questions.

Our previous white paper focused on the top five basic reasons to use practice management software:

1. Email and communications.
2. Group calendar and scheduling.
3. Phone messages and secure instant messaging.
4. Centralized assignments and tasks.
5. Creating and maintaining matters and contacts.

This follow-up white paper explores the top five advanced features.

In the current economy and even during good times, useful software enables you to get more for less. In the parlance of law firms, practice management software can help you and your colleagues increase productivity and capture all the time you bill.

1. Document Automation: Save Time and Reduce Errors
Law firms produce many routine documents from retainer letters to court forms and standard motions to wills to health care agent forms, etc. With very little effort, you can use a practice management program to automate much of the creation of these documents.

Not only can this "document automation" save a lot of time, it ensures that you use the firm's best "standard language" and avoid silly mistakes (e.g., neglecting to change the pronouns from male to female). Depending upon the nature of your practice, you may find that the document automation features of your practice management software boost your productivity more than any other technology.

2. Online Research: At Your Fingertips
"Google" has become a verb. Lawyers are heavily reliant on the Internet, not just for legal research but to "google" all aspects of a case. But once you find the information you want, how do you save it? Practice management software enables you to save your research, or a reference to it, along with other information concerning the case or matter. Not only does this storage make it easy to find your research (not always an easy task), but you can see if any information has changed.

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3. Mobile App: Take Your Office With You
Wedded to your smartphone for email? What about the rest of your office? Your calendar, contact list, tasks? Some practice management programs have a mobile counterpart — an application that resides on your smartphone and syncs wirelessly over the air with your practice management software. Even better, the synchronization occurs instantaneously. For example, if your assistant creates a new contact at the office, you can access it immediately on your smartphone. This technology is known as a "push service."

Not every practice management program offers this capability yet so look for the ones that do. Most practice management applications offer a less slick but still useful form of synchronization using Outlook as a conduit.

Another slick feature of a mobile companion application is the ability to bill a phone call after it ends. The software records the time of the call and offers to create a billable time record for you. The software may even know the client already if it recognizes the caller ID information.

4. Conflict Check: Reduce Risk and Maybe Your Insurance Premium
An essential element of accepting a new

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client is to make sure that the client does not present any conflicts with existing clients, or firm activity in the past. Because all your phone calls, contacts, and preliminary contacts with people who never panned out as clients reside in your practice management program, it is relatively easy to conduct a conflict check and sure beats circulating an email asking if anyone knows of any conflicts with potential client X. Recognizing this fact, many malpractice insurance companies offer discounts to firms that use software capable of conducting conflict checks.

If you pull together some of the time saving and billing information, it becomes clear that the return on investment of practice management programs verges on the spectacular.

5. Capture More Time: Boost Your Bottom Line

This last point highlights one of the central features of practice management software. In addition to becoming more efficient and saving time, you will also capture (and bill) your time more accurately.

Who remembers how long a phone call lasted? Many lawyers underestimate the time spent on the phone or replying to an email. A 10-line email message may require some research and might take 15-20 minutes to compose. Practice management programs have timers that can track this time and bill it to the matter much more accurately than you otherwise could.

If you pull together some of the time saving and billing information, it becomes clear that the return on investment of practice management programs verges on the spectacular. For example, if practice management software enables you to capture a seemingly modest 12 minutes per day that you would have otherwise lost, that's 48 hours per year (assuming you work five days/week and take four weeks of vacation). If you bill at $250 per hour, that's $12,000.

Conclusion

Practice management software is best classified as an investment because when used (as opposed to sitting on a shelf), it invariably generates far more in revenue than it costs. You can expect this result even if you use only the basic features discussed in our previous white paper. When you use the advanced features explored in this white paper, you'll reap even greater rewards.

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