

Top Five Reasons to Use Practice Management Software

by John Heckman



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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. This white paper answers these questions by discussing the top five reasons to use practice management software.

A practice management program is like a giant expandable folder, an up-to-date copy of which is always sitting on your desk. For each client or matter, subfolders contain documents, contact addresses, email messages, memos to file, phone slips, Internet research, etc. But instead of having to hunt for it, it's always easily accessible on your PC.

Unlike Outlook, which is based on individuals (all emails are listed as to or from a specific individual), practice management systems are *matter-centric*. By placing all case information in one electronic place, everyone who works on the case has access to it, instead of having it dispersed who knows where.

1. Email & Attachments

Email is arguably the single most important tool (and burden) in a lawyer's professional life. Organizing email can prove time consuming — and lawyers with thousands of unorganized messages in their Outlook inbox waste even more time. Multiply this by the fact that everyone at your firm regularly emails a client, opposing counsel, etc. about a specific matter.

Enter practice management software, which saves all email and associates each message with a given matter. Everyone involved in the matter can see all the email regardless of who sent or received it. A practice management system should also facilitate saving email attachments as well. This integration with your communications by itself is worth the price of admission.

2. Group Calendar & Scheduling

Calendaring and scheduling is a close second on this top five list. Practice management software enables you to see other

people's calendars, create group calendars, schedule conference rooms, etc. In addition, you can control court docketing, track statutes of limitations, create "chains" of dates (filings, responses, etc.) linked to one another that adjust automatically if one date changes, and much more.

Like many other aspects of practice management software, calendaring functions are aimed at centralizing and organizing your firm's matters, and preventing deadlines and events from falling through the cracks.

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3. Phone Messages & Secure Instant Messaging

Managing phone messages and keeping track of office operations can result in much wasted time. Do you have to yell across the hall (or even worse, send an email) about phone calls, clients waiting, etc? Do you come back to the office only to find yellow stickies pasted to your monitor or stacks of pink phone messages? How do you organize all those little slips of paper without losing them?

Practice management software enables you to review all your phone call messages and associate them with the relevant matter on your computer. Practice management software should also have some form of internal instant messaging system. A notification pops up on your screen (possibly with an audible alert) to let you know your new client has arrived, ask what you want for lunch, etc.

Unlike public instant messaging services such as AOL, the instant messaging system in practice management software is secure because your messages travel on your firm's network only, not on the Internet.



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4. Centralized Assignments & Tasks

In the bad old days, lawyers would call in their secretary and dictate tasks for the day, week, etc. Those days (along with the word “secretary”) have ended. With a practice management system, you can delegate tasks to a variety of people: associates, paralegals, and assistants. You can then track the degree of completion electronically and bug people when necessary. The ability to track these assignments is just as important as the increased ease of creating them.

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5. Matters & Contacts

The mantra of practice management systems is that once you enter a piece of information once, you never have to type it

again. You create a contact and associate it with one or more matters or other contacts. If a phone number or address changes, one person makes the change and it becomes available to everyone. Just as importantly, matters rather than people become the focus for all other information relating to a client.

Conclusion

The bane of a lawyer’s day to day existence occurs when important information falls through the cracks: from oversights to missing court deadlines (one of the main causes of malpractice suits). A practice management program “seals the cracks” and more efficiently tracks, maintains and organizes everything you do. Add to that substantial savings and additional time billed, and no law firm can afford to not have this software.

One caveat, however. No matter how extensive the feature set of a practice management program, keep in mind the importance of ease of use. You need a system that the entire partnership will buy into, and which even the technologically challenged attorneys in your office will use.

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