

# Practice Management Software: Your Road to Success

By JoAnn Hathaway

**P**ractice management software is a technology powerhouse that no law firm should be without. That said, many attorneys only have a vague understanding of what practice management software is and how instrumental it can be in caring for both their clients and their law firms.

Often referred to as front office software, practice management software is a matter-centric application — everything related to a matter emanates from the information entered into the software system. For a visual, think of the software as a digital red-rope folder. Many attorneys house their documents in these popular folders, with manila folders inside segregating documents and pleadings by type. Practice management software provides digital access to this information (and much more) in the blink of an eye.

## Features of practice management software

### Matter management

The ability to centrally manage matters is crucial to your practice, and practice management software stores information digi-

tally in a central location. Many of these applications provide the ability to customize fields and content of the information being stored based upon what is relevant to a particular matter type. The ability to access all relevant information from a screen or a few screens with the click of a button is what makes these applications so critical.

### Shared calendaring and docketing management

Virtually everyone agrees that law firms need to capture dates, deadlines, and tasks; this is true regardless of the firm's practice area. Practice management software enables users to capture relevant dates and relate them to a specific matter. User-created or predefined rules can generate reminders to alert those involved when a deadline or event is approaching. Since the software is part of a shared database, any number of individuals can be alerted about an approaching deadline or event and users associated with specific tasks are alerted when assignments are late.

Another feature available in most practice management software applications is the ability to apply rules-based docketing. If a certain sequence of dates applies to a

particular type of matter, formulas created using the application can automatically generate subsequent dates once date is defined.

### People management

Another powerful feature of practice management software is the ability to capture all sorts of relevant information regarding a person or entity that may or may not be associated with a matter. Like matter screens, many people-management screens are customizable; you can set up the system to capture information about a person or entity relevant to the entry you're making. For example, if you were capturing contact information about a person who served as an expert witness in a case, you might also want to document his or her area of expertise, whether they were credible, their hourly rate, and more. The ability to link contacts to a matter — or numerous matters — helps practice management software stand above other personal information systems.

### Conflict checking

Most law firm databases are incapable of checking for conflicts; best practices mandates should go far beyond just checking for

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parties to a matter. Most practice management software systems can search for anyone or any entity in a database from front office to back office to ensure any potential conflicts are brought to light for investigation and guaranteeing you have done your due diligence before taking on that matter.

#### Document management

Finding documents can waste many hours of unbillable time. Document management features are often a function of practice management software and require users to comply with a universal naming protocol, making naming subjectivity a thing of the past. Records can be searched easily, saving precious time. Document version control is built into many of these applications. The usefulness of this feature cannot be overstated.

#### Document automation

Many attorneys are familiar with repurposing documents. It is a far too-common practice and a disaster waiting to happen. Many practice management software applications not only have built-in document automation functionality, but also synchronize with stand-alone applications such as HotDocs to swiftly produce documents. Merging templates and other means of automating document production are additional robust features of this software.

#### Research management

Capturing, sharing, saving, and repurposing research is another wonderful feature of practice management software. Attorneys conducting research in silos has long been the standard, resulting in firms constantly reinventing the wheel due to the lack of communication, sharing, and building upon historical research. With practice management software, research can be saved, searched, updated, and shared with others in the firm.

#### Billing and accounting

Billing and accounting can be part of practice management software. Practice management software can also link to other stand-alone billing and accounting platforms.

This stand-alone software, also referred to as back office software, can provide numerous functions, including timekeeping, billing, and accounting. These applications are best coupled with front office software for full integration.

#### Picking the right product

There are many practice management software applications available in today's marketplace. Some are premise-based (you download the application and maintain it) and some are cloud-based. Most have general features suitable for any area of practice.

Those considering practice management software often ask for recommendations from their peers or technology consultants. With so many moving parts and variables associated with each law firm's needs and requirements, this question must be assessed on a case-by-case basis. The software that fits one firm might not necessarily be a good fit for another.

Knowing what practice management software can do for you is the key to assessing the numerous options in the marketplace. Once potential purchasers sit through demonstrations from software vendors or consultants, they can begin to compare the functionality of the applications and arm themselves with the knowledge they need to decide which application is right for their firm. Kicking the tires of several applica-

tions before making a commitment is time well spent.

#### It's all about training

Purchasing practice management software is not enough. It is imperative that a firm train the people who will use the application. Many firms cut corners on training — a big mistake that can keep people from fully utilizing the software or not using it at all. During the selection process, firms should ask about training options and costs.

Some providers offer training via videos and webinars. Some charge for training, some do not, and some have a blend of free and paid training. Some include training with the purchase of an annual maintenance plan, while others offer training through a certified consultant. Regardless of your options, user training must be part of your plan.

#### Conclusion

For more information on practice management software, contact a State Bar of Michigan Practice Management Resource Center advisor at (800) 341-9715 for a one-on-one consultation. ■

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