NJSBA PRACTICEHQ
Prepared by Affinity Consulting

WHY YOU NEED PRACTICE MANAGEMENT

Practice/case management programs handle your calendar, contacts, matters, time entries, documents, emails, phone messages, texts, etc. It organizes your life, “thinks” like a lawyer, and quickly proves itself essential.

WHAT PRACTICE MANAGEMENT SOFTWARE HELPS YOU DO

MANAGE YOUR FILES

The essential element of a practice management system is file/case/matter management. It is the feature that all email/contact/calendar combos lack, whether it’s Microsoft’s Outlook, Google’s Gmail and Calendar, or Apple’s iCloud apps. Your law practice revolves around your files. Immediate access to your case information, such as who is involved, events, tasks, communication, time entries, etc., makes these programs an invaluable practice resource. This information is also available to everyone in your firm working on that matter. No matter how much you customize your email/contact/calendar suite, you will not create matter management. The general-purpose programs fail to understand the all-encompassing, umbrella nature of a matter and the many types of information it contains.

MANAGE YOUR CONTACTS

With so many ways to reach people today—phone, text, email, and even old-fashioned mail, you must maintain accurate and complete contact information for clients and related people on each matter. By training the staff to input contact information correctly, you will be able to fax, email, call, text, or communicate in writing with a contact with a minimal amount of effort. Contact information can also be used to perform preliminary conflict-checking when evaluating whether to accept representation in a prospective matter.

MANAGE YOUR CALENDAR

In the legal world, calendars control and yet change constantly. Have a way to manage your calendar individually and 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. The calendar must be easily changeable, easy to read, and 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, physical equipment, etc.) without speaking to the staffer responsible for the resource.

MANAGE YOUR TASKS

Your day is about prioritizing the endless list of things you must do for clients and the firm. Deadlines reign supreme. Your case management software should be able to manage a task from when it is put on the list until it is billed and ready to send to the accounting system. Often, your tasks are linked to other tasks. Perhaps you can’t do something until a predecessor event or task concludes. Your case management software needs to be able to link events easily.

MANAGE YOUR TIME ENTRIES

It must be as easy as possible to record and bill 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. Most of your billable time comes from appointments, tasks, phone calls, and emails. A good case management software should help you capture otherwise lost billable time.

MANAGE YOUR COMMUNICATIONS

Today, client communication arrives in several forms: mail, phone, email, text, and even program-specific instant message apps. Information relating to matters belongs with those matters. In past decades, lawyers stored letters or faxes in the paper case file. The methods have changed, but the rule remains the same—store case information in the case file. Effectively managing multiple communication methods is the best way to improve client satisfaction. Case management software should allow you to record and bill your communications efficiently. Legal professionals lose billable time because they forget or fail to record communications. Mastering your communication management will pay for your case management software and implementation over and over again.

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. Efficiently preparing your documents is a critical time-saving feature of practice management software. Organizing your most frequently used documents into a template structure and then creating those documents from within your case management program allows you to ensure consistency in firm-produced documents. Furthermore, since the document generation process extracts client information from your practice management software, you reduce the potential for client information errors in the final document.

MANAGE YOUR RESEARCH

Accessing your research provider quickly and compiling your firm research into a central location so others can access 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 someone else already found and cataloged. The various software programs approach research organization differently.