

3 Essential Tools for B2C Law Firms



b2c law firm tools feature image

Does your B2C law firm have it?

Do you have the essential tools you need to rapidly grow your client roster, billings and your firm? If you hesitated for a second or you're unsure of the answer I have good news.

You're not alone.

Even better, with the right toolset, you'll be able to run circles around your underdeveloped peers.

Your B2C firm needs the right toolset

With the right toolset you'll be able to meet both the explicit and implicit expectations of your new clientele. As we've seen, your firm's technical needs are dictated by your client's needs and circumstances.

What specifically do you need?

Let's take a look at the essential toolset you'll need to dramatically improve your firm's performance on client matters.

Tool #1: Practice management software

[Practice management software](#) acts as your firm's nervous system. It enables you, at a moment's notice, to assess your firm's performance. It enables firms to quickly identify the solutions that work and the problem areas you'll need to address.

Good practice management software should manage:

- Emails
- Calendars, scheduling and time management
- Project and task management
- Billing, invoicing and online payments
- Time tracking, expense tracking and firm reporting
- Contacts

These features should be readily available to firms.

The problem?

The majority of B2C law firms are using inadequate practice management software. According to the [ABA's 2017 Legal Technology Report](#), 57% of respondents felt *Microsoft Outlook* was an ideal practice management solution, even though it lacks the essential features need to manage their business effectively.

It's an opportunity.

Immediate and complete adoption of excellent practice management software puts your firm ahead of your peers. It gives you the technical prowess your firm needs to become lethally efficient.

Tool #2: Document management and retention

Your employees should be able to find the documents they need in seconds. Time is money, every minute your team spends searching for or re-creating documents is [billable time lost forever](#). Document management is *indispensable* to the growing B2C law firm.

Your document management and retention tools should:

- Help to enforce file and folder naming conventions
- Provide attorneys with appropriate version control (i.e. providing all versions of previous files)
- Maintain document permissions and security, delineating user rights and abilities
- Help to minimize the amount of non-billable work in your firm loss to document management challenges

Here's why this matters.

[Gartner found](#) that most law firms are **missing almost 50 percent** of their data. *Eighty percent* of the intellectual property a firm handles is communicated with or stored via email.

How does that affect advocacy on your client's behalf?

It hurts your ability to perform. It makes it difficult to achieve the results your clients desperately need. Which is why I say *document management is a (silent) component of advocacy*.

Tool #3: Client communications

Your clients can't evaluate, manage or monitor your progress on their matter. They simply don't have the knowledge or expertise needed to do that.

Nor should they.

From their perspective, that's *your* job (obviously).

This is why you'll need client communication tools. Whether your focus is B2C or B2B, communication is essential. Your clients don't need an email, phone call, text message or in-person meeting for each and every update. That's what a client management system is for.

Your client communication system should:

- Provide you with a client portal, enabling you to [communicate with clients directly](#).
- Properly delineate the attorneys and support teams working on your client's matter.

- Provide clients with detailed and secure updates.
- Provide clients with billing, invoicing and financial reporting on their matter.

These details should be clear.

Your clients shouldn't have to ask for them. They shouldn't be required to beg you for financial reporting or account data.

This transparency puts them at ease.

This precise level of communication is important because, in the end, it enables you to generate positive word-of-mouth and win more referrals.

Does your B2C firm have the right toolset?

It should.

With the right toolset you'll be able to meet both the explicit and implicit expectations of your new clientele. Your firm's technical needs are dictated by your clients needs and circumstances.

Sophisticated firms know this.

They position themselves ahead of their peers using an essential toolset to dramatically improve their performance on client matters.

You can too.

With the right toolset you'll have the structure you need to rapidly grow your client roster, billings and your firm. No hesitation necessary.

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