Legal Practice Management Software For Family Law Firms

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Now's your chance.

If you're reading this, you're probably already familiar with practice management software. You may have a general idea about why it's important.

Now's the time to strike.

The ABA's legal technology report 2017 found many firms already use practice management software. At first glance, this doesn't sound like an opportunity. It sounds like **saturation**.

Why "practice management" isn't what it seems

There is a surprising secret here.

When it comes to software, the term "*practice management*" has a very broad definition. What does that mean exactly? It means 57% of those surveyed in the above report consider Microsoft Outlook and effective practice management tool.

Outlook is indispensable.

But it's not a practice management tool. Yes, Outlook has email, calendaring, and contacts functionality. But Outlook lacks the timekeeping, billing and accounting functionality firms need. It's missing the document, project and matters management your firm needs.

It's not a dedicated tool.

It was never intended to be. It's an ad hoc solution that's adapted to meet the needs of attorneys and growing law firms. Don't misunderstand, I'm not advocating that you abandon Microsoft Outlook altogether.

It's actually the opposite.

I'm advocating that you *augment* Microsoft Outlook with a *true practice management* solution that performs the way your firm needs it to.

But why?

Why would your family law firm need a practice management solution?

You already know the answer to this problem

Non-billable work.

That phrase snaps everything into perspective, doesn't it? If you're like most law firms, your associates are spending (wasting) a significant amount of billable time on non-billable work.

It's an unpleasant reality.

Furthermore, your employees hate filling out timesheets so they do their best to delay the inevitable. When they finally fill out their timesheets, they're often wildly inaccurate. As a result, firms struggle routinely with under and overbilling.

But wait, there's more.

You're expected to wrangle with document management and retention headaches. You'll need a client portal to communicate privately (and securely) with clients. You'll need your associates to fill their timesheets out accurately and on time (which is difficult).

It's too much to carry.

Yet that's exactly what many family law firms are attempting to do right now. They're attempting to manage all of their non-billable work on their own.

It's soul crushing.

The good news here is that it's also *completely* unnecessary.

You need help carrying your burdens

You work *so hard*.

You're spending a significant amount of time on *essential minutia*. On the important non-billable work that *needs to be done* but *absolutely* shouldn't be done by timekeepers in your firm.

It's worse for you.

It's difficult and stressful enough for attorneys in standard practice areas like business, tax or real estate law. It's far worse for you because you're dealing with emotional volatility. You're seeing clients (and/or their loved ones) at their worst.

It's high stress all the time.

Typically, there is a significant amount of emotion and hostility involved. Client expectations are high. Often times clients are facing a significant downside. The pressure on you to perform is constant, never-ending.

This is why you need help.

Client trauma + *essential minutia* = burnout

The research bears this out.

- Stress, Burnout, Vicarious Trauma, and Other Emotional Realities in the Lawyer/Client Relationship: A Panel Discussion
- Secondary Trauma and Compassion Fatigue when Working with Clients in Crisis
- Do Not Make their Trauma Your Trauma: Coping with Burnout as a Family Law Attorney
- Vicarious Traumatization: The Corrosive Consequences of Law Practice for Criminal Justice and Family Law Practitioners

Those practicing family law have a unique fight on their hands. It's the fight against compassion fatigue, vicarious and secondary traumatization. The research shows it's a consistent and distressing problem for those in your practice area.

It's not easy.

But you *can* be successful, with the right tools.

Do the right tools relieve your burdens?

They should.

Your management burdens should disappear. That's what good software does. Good software eliminates your problems. *Great software* eliminates your problems, simultaneously teaching and correcting your team without your direct, day-to-day involvement.

Great isn't enough.

Great software requires an amazing team alongside it. When your team runs into trouble, get stuck on a routine issue or simply needs to ask a few "foolish" questions, they're going to need help. Who will they run into? A customer support rep who simply can't be bothered with their mundane problem or a consummate professional that's looking for a chance to add value?

This should be your long-term focus.

Let's be honest here. You not *really* looking for a software solution, are you? That's the last thing you need right now. You're looking for a solution to your problems. You're looking for consistent **results**. Let's say you're in the market for practice management software.

Where do you start?

You're interested in the results we've just discussed. What *specifically* should you be looking for?

Requirement #1: The feature set you need

Notice I didn't say the feature set you *want*. It's important to focus on the core set of features you need to manage your firm successfully.

What does this mean?

You're looking for **primary features** such as…

- **Accounting and reporting:** Immediate and on-demand access to accounting data including but not limited to: outstanding balances, work-in-progress, aging reports and more. You should be able to access reports outlining profit per employee/partner, profitable practice areas and more.
- **Calendar/docketing:** You'll need a simple and straightforward way to keep track of your appointments, meetings, events and court proceedings. Your software should work with common platforms like Microsoft Outlook.
- **Client portals:** The vast majority of your clients are going through an emotionally turbulent time. They're going to want clear and consistent communication from you. The client portal gives you a significant degree of control over the amount of time and access the client has to you and the employees in your firm. This separation gives you the ability to focus your attention on your client's matter rather than emotional support. Remember, it's about the advocacy.
- **Document management and retention:** Many large firms rely on on-premise software. As a result, employees who are out of the office are typically unable to access the documents or data they need. Additionally, the search capabilities and user rights management protocols of most document management tools are poor. This means most employees are saving confidential client data to their personal Dropbox accounts. Ideally, your document management solution handles *three specific areas for you*: **(1.)** Storage, retention and access **(2.)** Security and user rights management **(3.)** User access and version control (to avoid creating duplicate content).
- **Matter, project and task management:** Who's doing what and when? Which employees are the most productive? Are tasks being completed on time? Are client matters handled proficiently? This feature should provide you with a real-time, comprehensive view of what's being done for each client or matter at any given time.
- **Online payments:** The easier it is for your clients to pay your invoice, the more likely you are to be paid fully and on time. You should be able to bill, invoice and receive payment through a single, unified system. Technical prowess and financial expertise *should not* be a prerequisite.
- **Time and expense tracking, billing, invoicing:** Automatic time tracking is a must. Manual timekeeping is expensive and inaccurate leading to billable leakage and under or overbilling. Time tracking should be initiated with the push of a button and completely hands-free. You should be able to

record billable and non-billable time. Separately track internal non-client time, and track staff, contractors and consultants for precision accuracy.
- **Compliance and performance requirements:** You should be able to reconcile Trust and IOLTA accounts without a secondary application. You should have full access to the UTBMS litigation code set.
- **Data security:** Cybercriminals are aggressively targeting law firms' data. Data breaches are becoming routine for solo and small firms. Your practice management software should be secure. Your data should be *secure both in-transit and at rest*. Look for 256-bit encryption and SSAE 16 (SOC 1) compliance.

Secondary features such as…

- **Mobile accessibility:** Your team should have access the full feature set, your data and tools both in and outside the office. If your team relies on automatic timekeeping in the office they shouldn't devolve into manual timekeeping when they're on the road. Your team should have access to the same suite of tools whether in-house, on the road or out of the country.
- **Online and off-line access:** You've just lost internet access but there's work to be done. Can you still track your time automatically? The answer should be a resounding yes. You should be able to consistently access core features of your application whether you're online or off.
- **Data migration:** Your practice management provider to offer a straightforward method to migrate your data. If migration is a challenge, your providers should be willing to help you migrate key portions of your data over to their platform at no cost to you.
- **Third-party integration:** Your practice management software needs to integrate with the tools you're already using. It should integrate with the tools you're already using e.g. Microsoft Outlook, QuickBooks, Box, Stripe, PayPal, and others. There should be a clear roadmap or plan to follow for future integrations and upgrades.

More importantly, these features need to be implemented thoughtfully. Some providers eschew hard requirements. They claim to provide firms with customization and flexibility as a compelling value-add. *You should be free to run your firm your way,* they say.

This increases risk and liability to your firm.

How?

Customization, when mismanaged creates legal liability. Remember the user rights example I shared earlier? The one where associates saved confidential client data to their Dropbox accounts?

That came from too much flexibility.

Your practice management provider should **(a.)** Have the feature set your family law firm needs **(b.)** be able to explain their specific implementation of those features providing you with a limited amount of flexibility and **(c.)** show you (and your team) how to use those features.

Requirement #2: Verify performance, vet customer service

What happens when you call for help?

Can you reach a real person when you call? How long does that take? When can you connect with someone via live chat? When you *do* connect with customer support how do they treat you?

You'll need to ask questions.

With a good provider, it's easy to get your data in and out of the platform. But not without considerable disruption to your business. Asking questions, verifying service quality ahead of time gives you the confidence and clarity you need to see their service for what it truly is.

Which questions need answers?

- Are support reps knowledgeable and clear?
- How often are your questions answered completely and concisely?
- Are support teams patient and kind or are they condescending and rude?
- How long do you have to wait for help or a reply to your support ticket?
- What do other customers say about the product?
- How do support teams handle "dumb" questions?
- Will support reps import your clients for you?
- Do they bill you for extra training, service or support?
- Are you consistently forced to rearrange your schedule around their needs?
- Do they have training-aids available at any time?
- How do they respond when you're at your worst emotionally?

You'll want to verify and validate the service you'll receive *before* you become a customer.

Requirement #3: Ease of use

Your practice management solution should be easy to use. It shouldn't be a headache or hassle for new associates and support teams.

The software should be intuitive.

There should be contextual clues and built-in training aids. These training aids should show your employees how to use the software appropriately. Yes, training should be readily available but this isn't *really* ideal, is it? In an ideal scenario, your employees should be able to get started immediately. They should be able to figure things out fairly quickly on their own.

When this happens your software *disappears*.

It becomes a solution to your firm's problems. Your software should perform beautifully without requiring a great deal of customization or flexibility.

It should just work.

It should perform immediately, generating the results you need without a significant investment of time or energy.

Now's your chance to relieve your burden

Most firms aren't on board yet.

As we've seen, the term "*practice management*" has a very broad definition. Almost 6 out of 10 surveyed considered Microsoft Outlook an effective "*practice management*" solution.

Outlook is indispensable.

But it's not a practice management tool. It's an ad hoc tool that's been co-opted by the industry. Like many other practice management tools it works, but it's just not good enough.

You deserve better.

If you're like most firms, you lose a significant amount of billable time to *essential minutia*. What's worse, your practice area keeps you under an incredible amount of stress.

Client trauma + *essential minutia* = burnout.

The right tool relieves (some) of your burdens. It frees you from the *essential minutia* most attorneys struggle with on a daily basis. An ideal practice management solution frees you from these headaches. It gives you the consistent results your firm needs to grow.

But only if you know what to look for.

Now you do. It all comes down to questions. Asking the right questions gives you the data you need to identify your ideal solution.

This isn't simply a software problem, it's a *software* + *service* problem.

Identify the right provider, one that delivers the software + service you need. You'll find you have the opportunity and support your firm needs to pull ahead of your peers.

Try Bill4Time for free.