Family Law Guide to Practice Management Software

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When you work at a family law practice, you know that your clients are often going through a difficult time. They're struggling with thorny issues like divorce or child custody disputes. They're figuring out how to split their shared property, whether alimony is needed, or how much child support is owed. Emotionally, it's a lot, and the legal steps they need to take only add to the pressure they're under.

Your clients are making life-changing decisions—you don't need to add stress to their life by being disorganized.

Make sure you bring your A-game and make the process as smooth as possible for your clients by implementing robust legal practice management software. Features like task management and customer relationship management software keep you organized and simplify the onboarding process for your clients.

If you're shopping for legal practice management software for your family law firm, double-check that it offers all of these crucial tools.

Simplify Workflows to Ensure a Stress-Free Client Experience

When you work faster, your clients benefit. But you don't want your work to be sloppy. Rather, it's more important to eliminate busywork and streamline your processes wherever you can. Simplify your workflows with features like calendars, task management, and secure file sharing and e-signature to keep the process smooth and stress-free for your clients.

CALENDARS

A robust calendar management system is crucial to keep your clients up-to-date on what's going on with their divorce and to keep you on deadlines. Use calendar invites for any ongoing meetings with your team about your client's case so that everyone's on the same page. Set up recurring reminders in your calendar of upcoming deadlines for a client so that every necessary task, like filing divorce papers, is finished well before it's due.

You can also use your calendar to remind you to update clients on the status of their cases. Even include them in a meeting if you'd like, or put them on the invite, so they know their needs are being addressed. You can also utilize helpful calendar integrations, like LawToolBox, which manages your court deadlines and calculates court dates for you.

TASK MANAGEMENT

A robust task management system that works in tandem with your calendar helps you stay focused and on schedule. With task management features, you can assign tasks to specific team members so no one accidentally drops the ball on an important parenting plan because they think their co-worker is doing it. You can assign the parenting plan to the correct person directly, along with a due date so they see the item in their calendar.

This feature makes it easy to update clients as well. If they call with a question, the entire schedule for their case will be in your calendar. You can deliver an answer in minutes rather than trying to shuffle through documents or a paper calendar to figure out when a date's coming up or when important paperwork is due.

SECURE FILE SHARING AND E-SIGNATURE

Divorce takes long enough as it is. You don't need a signature request slowing the process down. Secure file-sharing and e-signature features quickly send documents to your clients with robust security features like customized security Q+A and expiring access deadlines. Additionally, your clients can sign documents straight from their phones, so they don't have to be in front of a computer to access paperwork.

Secure file sharing allows for larger file transfers than a typical email would, so you can share large drops of files at one time with clients.

On top of ease of use, secure file sharing provides bank-level security for your clients' sensitive data. In 2021, 50% of small and mid-sized businesses suffered a cyber-attack. You need to implement extra layers of protection to ensure that your clients feel safe sharing their personal information online.

Rocket Matter's secure file sharing feature offers high-level security without the hassle of a client portal.

Build Strong Relationships With an Integrated CRM

Customer relationship management software can ensure that you contact potential clients in a timely manner. Legal CRM like Law Ruler automates client follow-up for you. For a client experiencing something as difficult as a divorce, there are few things more frustrating than having to play phone tag. Clients want to know that someone's listening to them and cares about what they're going through.

Instead of missing incoming calls while you're busy working on client matters, Law Ruler can send automated email and text message follow-ups on your behalf. This connects you with clients immediately so no leads are left behind.

Another helpful aspect of a CRM is simplified client intake.

This beginning stage of the process with a client can bog family lawyers down with busy work when you'd rather be working on taking care of clients. But a robust CRM streamlines client intake. Smart intake forms help qualify leads for you, which takes the pressure off your intake staff. Personalized online forms capture all the necessary information you need from clients, and then upload it to your software—and voila, no more mindless data entry or errors from manual inputs.

Keep Client Details Organized to Avoid Asking for Sensitive Information Twice

When you're working at a family law firm, clients are often at a low point in their lives. You don't want to make them re-live any painful memories because you forgot to write down something important or lost track of a sensitive document. Legal practice management software offers helpful case and project management tools so you can keep everything you need for a client in one place.
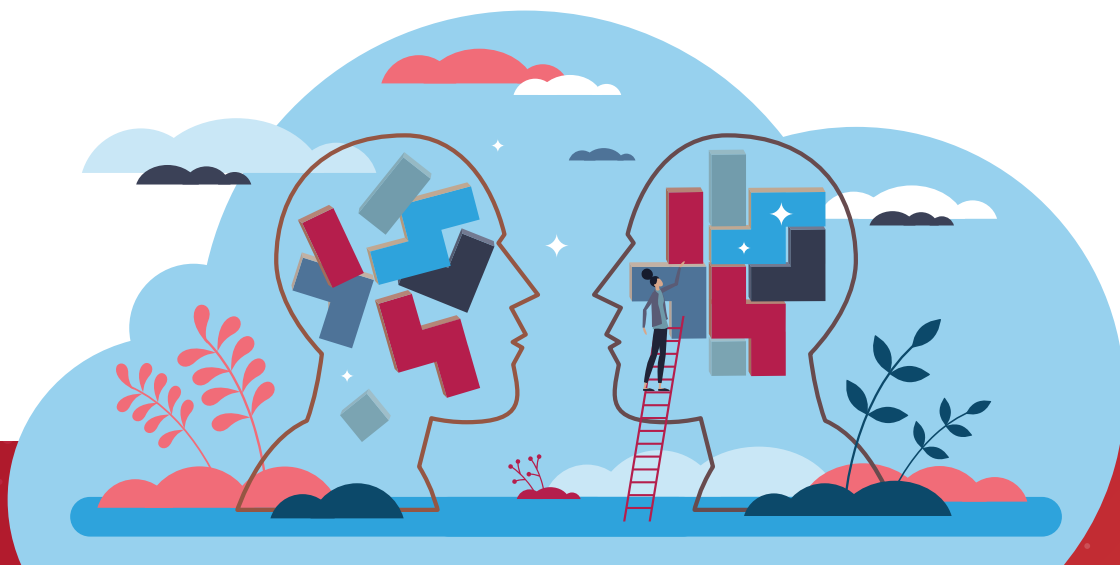
CASE MANAGEMENT

Case management software highlights case details with comprehensive dashboards. View a matter's calendar events, tasks, and contacts in the dashboard, and you can arrange the widgets to prioritize the information you need the most.

You can customize your matter templates to make them as flexible as you want. Add due dates and tasks to matters that appear in your calendar. Easily define relationships within any family law case so you can include important people like family members and guardians.

PROJECT MANAGEMENT

You also need to organize the workflow for each stage of a project. Project management software lets you customize workflows and transitions for each phase of a case. You can create calendar events and deadlines, tasks, and other custom data so that setting up a new family law project is automated.

Another helpful feature for conceptualizing projects is KanBan boards. They use visual cards in your software to track tasks into customizable columns, breaking big projects into manageable chunks in a way that's easy for your team to work through.

Stay Available to Your Clients by Using Mobile Apps

When a client is in crisis, they need to know that they can reach you at a moment's notice. That's why legal practice management software offers robust apps for your phone and tablet. With an app, you can look at case history, client data, and other pertinent data you need to answer questions and complete work from any location. Plus, you can bill for time on your phone, so no billable hours are missed.
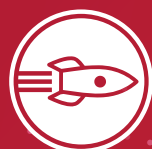
Do Your Best Work with Rocket Matter

There are various legal practice management software options out there, but Rocket Matter is unique because it offers everything you need to manage your family law practice in one software. With Rocket Matter, you get:

- Robust calendar and task management
- Thorough case management tools
- Simple project management functions to maximize your workday
- Integrations with helpful CRM software like LawRuler and accounting software like Quickbooks

See for yourself why Rocket Matter has been trusted by law firms for over 12 years for unparalleled products and service—schedule a demo with us today.

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