

The Small Firm's Guide to Big Tech



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While any change in how you operate your law office can feel overwhelming, there's never been a better time to start migrating your office structures online. Big tech changed the game in how we run our everyday lives, so stay up to date with the latest available software solutions to keep clients happy.

In the long run, implementing the right law firm software tools will make the day-to-day work of running your law office a whole lot easier.

Legal tech is a robust, growing industry, with 20.8 billion dollars in revenue in thus far, so you don't have to worry about any of these tools being phased out in the near future. It's time for your small firm to make the jump to a law firm practice management software, or to upgrade your existing tech stack to include these top ten legal software resources every firm should be using.



1. Customer relationship management programs

The most important element of your law firm is the everyday people who come to you for help: your clients.

The speed and consistency of your interactions with them can make or break their experience at your firm, and implementing a customer relationship management (CRM) software can help you streamline these interactions. Legal CRM software makes it easy to send automated, personalized follow-ups by email or text to maintain your client relationship. Additionally, you won't lose out on potential leads because you were just too busy to get to the phone.

You'll benefit from a robust suite of contact management and marketing automation tools that make it easy to sign more clients and keep those clients happy.



2. Secure file sharing and e-signature tools

Secure file sharing and e-signature tools allow your clients to receive and sign documents from their computer, phone, or tablet. This means that they won't have to drive into the office or mail anything by a certain date and makes it easier for your firm to get key documents reviewed and signed by clients more quickly.

With the right legal software, you can even send secure documents and signature links directly to your email—no need for that client portal. (Unless you really want to!)

3. Payment processing software

To collect payments faster and make the payment process easier for your clients, consider making the switch to online payment processing. With the right software at your fingertips, your clients will be able to pay their invoices conveniently by credit card or eCheck, and your account can be funded in as little as 12 hours.

Offering online payment options can significantly speed up payments and streamline your firm's collections, but it's important to choose the right payment processor before you start to process credit cards. A credit card processing solution that's designed specifically for law firms will include safeguards to prevent commingling of funds and other trust account compliance violations.



4. Project management platforms

Project management software can help you maximize efficiency as your team collaborates on complex legal matters. A good software should include calendaring tools to help your whole firm track key matter deadlines, as well as customizable project templates and Kanban boards to foster better team collaboration.

When your whole team is able to quickly view all current deadlines and upcoming tasks, it's much easier to react to workflow bottlenecks with agility and reassign work where necessary to make sure your matters remain on track.

All of this allows for more streamlined workflows and better communication between team members.



5. Time and billing software

Before you can get paid for all your hard work each week, you need to accurately track—and bill for—all of your billable hours. Look for legal software that offers easy-to-use timers that your attorneys can use to track their hours in real time as they work. Some software will even allow you to track your time from within Outlook or while using your document software, so it's easy to ensure every minute is billed for.

You'll also want to invest in software that saves you time on invoice preparation. Ideally, you should be able to quickly generate invoices from customizable templates, set up recurring payment plans, and use batch billing to knock out all of the month's invoices at once.



6. Trust accounting features

Careful compliance with bar rules is key when it comes to [legal trust accounting](#), and generic accounting software like Outlook aren't designed to help you avoid common trust accounting errors. But with the right legal-specific trust accounting software at your disposal, you can manage all of your trust accounts while avoiding common compliance concerns and effortlessly keeping up with bar requirements like trust account reconciliation.

7. Document automation tools

Going paperless with your documents means that you can automate tasks that used to take hours. Document automation tools allow you to generate legal documents in seconds from preexisting templates, then populate them with data pulled from your client database. By cutting down on the amount of manual data entry you're doing, you'll save time AND reduce the likelihood of data entry errors.



8. Contact management programs

The right legal software lets you keep all of your law firm's contacts accessible, organized, and easily searchable. You should be able to quickly create new client contacts and add custom tags to make them easier to find, organize, and group together.

Your firm will also want to look for software that allows you to run conflict of interest searches more quickly and thoroughly. When you have all your contacts conveniently stored within the same database, you can quickly run comprehensive searches across all of your contact entries at once.



9. Advanced reporting tools

As you consider different legal practice management solutions, you should also look for software that offers robust reporting capabilities. Running monthly reports can allow your firm to track key performance indicators (KPIs) to better understand your firm's efficiency, productivity, revenue, and more.

These reports can show you which team members bring in clients and cases, how productive each team member is with the matters they're assigned, and how much each matter is actually costing your company.

In short, they can help you make informed decisions for the future of your firm.

10. Automated case deadlines programs

With any legal case, you need to stay on top of your deadlines to ensure you never miss a crucial filing date. Look for legal software that integrates with helpful apps like LawToolBox, a court rules and deadline management system provider. That way, you can sync your case deadlines with your legal management software, so you can review all important upcoming dates in one spot. you'll save time AND reduce the likelihood of data entry errors.



Rocket Matter delivers big tech at small firm prices

The best part of all the powerful software tools above? Almost all of them are available with only a single software subscription. [Rocket Matter's](#) robust legal practice management software offers these features within a streamlined and intuitive interface built specifically for lawyers—and our wide array of robust third-party integrations can help you cover the rest of your software needs without relying on a patchwork of separate software.

So when you're ready to start putting big tech to work for your small practice, there's no reason to break the bank investing in a dozen different software. To see how our robust legal practice management system leads to higher profits and happier clients, [schedule a demo](#) today.



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