

# **BEFORE YOU BUY:** **What to Do Before** **Buying Legal Practice** **Management Software**





How you manage your legal workflows dictates how speedily you can finish tasks throughout the day. Carefully select your legal practice management software, so it improves your workplace rather than making your operations more complicated.

Follow these steps to figure out what you need before buying any legal practice management software.



## Step 1. Identify your firm's needs

All law firms benefit from implementing practice management software, but a small hometown firm with a couple of lawyers will need different tools and functions than an AmLaw 200 firm in downtown Los Angeles.

How do you figure out what your firm needs?

Get key stakeholders involved in discussing your legal practice and its pain points. You should walk away from this conversation with an idea about what features to look for. For example:

- Your clients want to be able to sign their documents from their phones, so you need secure file sharing with e-signatures
- Certain employees want to stay remote after the pandemic, so you need case management software that they can access from any device to stay in the loop on client matters.
- Your firm needs to minimize errors with legal trust accounting, so you want software tools that help you stay in compliance.





## Step 2. Consider your budget

Next, consider your budget and how much you can spend on legal practice management software.

Straightforward monthly pricing is a good option for many law firms—if the software doesn't work out the way you expect it to, you can cancel it later.

And tiered pricing allows you to choose the level of legal practice management that works for your firm and not pay for any extra features you don't need.

To make the most of your technology budget, choose software with all the features you need so that you don't have to spend money on two different programs. And if you're already using specific software, like Quickbooks or Microsoft Office, ensure software integrations are offered so you don't have to change your already-established workflows.





### Step 3. Look for these key features

Your practice management software will act as the hub of your law office. Make sure it has everything you need to run an efficient, profitable practice.

- **Time Tracking:** Time is literally money for law firms, so you don't want to overlook any. Record your billable and non-billable hours from your email or phone, so you can bill accurately.
- **Legal billing:** Take the stress out of billing processes with software that does the hard work for you. Process invoices simultaneously with batch billing while you work on other tasks. Plus, you can schedule prebills to go out automatically via your preferred electronic method.

"Maximize your time. With Rocket Matter Pay, automated recurring billing and payment plans free up your accounting team to focus on more complex projects to support your practice."



### Core features

- **Case management:** Are your cases organized? Automate task assignments to streamline legal workflows and reduce email clutter. Categorize tasks by matter type, client, or any other classification that suits your to-do list.
- **Legal project management:** Project management features help you stay on top of your work. Kanban boards let you visualize your current matters, with drag and drop features to update the case status.
- **Document automation:** Create legal documents in seconds with client and matter data stored in your software—plus certain document creators can even find errors and missing information for you. You'll never have to redo a finalized document again.
- **File sharing and e-signature:** File-sharing and e-signature increase convenience 10-fold for you and your clients. Gather documents and signatures securely from a phone, tablet, or desktop so clients can avoid extra trips into the office—and you can move legal matters forward.





## Integrations

If you have software you already know and love, you want to make sure that it works with your practice management software, including:

- Office 365 and Outlook
- Google Calendar
- Quickbooks
- Dropbox

Improve your operational efficiency with new integrations. Legal practice management like Rocket Matter integrates with these helpful legal software tools.

- **LawToolBox:** a court rules and deadline management system tool
- **Lawmatics:** customer relationship management software specifically for law firms that offers an automated intake process
- **Uptime JurisPage:** creates and updates high-performing law firm websites





## Step 5. Check that the software offers robust software support

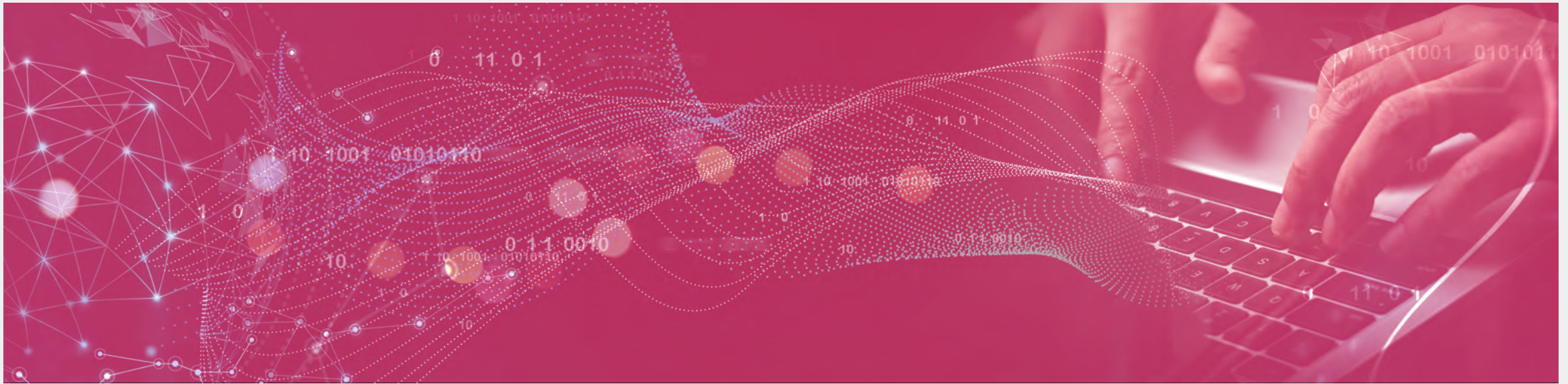
With any new legal practice management software, make sure the company provides robust and responsive support in case any issues arise during onboarding or in everyday use.

Make sure the software support is US based. This helps any tickets get resolved in hours rather than days.

And be sure to ask if the help-desk ticket goes straight to a person. You may not see same-day resolution if it goes to a robot or automated service.

“Rocket Matter’s robust customer service support is US-based, so your ticket resolves in hours, not days.”





## Step 6. Try the software before you buy it

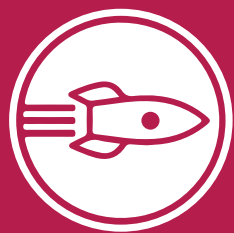
Your practice management software is a significant investment of time and money for your team. Trial all contenders before you sign up or purchase. A full-featured trial lets you get hands-on with the product and see if it will work well with your team.

When you trial a software, consider the following questions:

- How easy to use is the software? Does the interface make sense?
- Are key features easy to access from the dashboard?
- Do the features deliver the promised functions?
- Are any customizations easy to set up?
- What problems are team members experiencing? Is there training or other resources to help support them?







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by **√profitsolv**

**Schedule a demo** with Rocket Matter's top-rated legal practice management software

Rocket Matter's comprehensive legal practice management software covers every feature included in this guide and more, so you secure every tool you need to manage your law firm in one place.

But don't just take our word for it. **Schedule a demo** with Rocket Matter today and let us show you how easy it can be to manage your law firm.