End-to-End Legal Practice Management Solutions for the Thriving Law Firm

It's time to leave siloed standalone software and legacy systems behind and enter the era of complete, scalable legal practice management software.

Is your firm just making do?

Before, firms could mostly make do with their legacy tools and processes. But, outdated systems and makeshift tools — even those purchased in the last 3 – 6 years — are no longer meeting the needs of many firms. As a result, law firms are investing in legal technology to gain efficiencies and meet new and increasing demands as they grow.

Take a moment to think about your firm's current technologies and the processes that rely on those systems.

At minimum, your legal practice management software should be able to:

- Break down communication silos both internally and externally
- Collect, organize, and share case/matter information and client documents
- Help your team avoid missing tasks, appointments, and deadlines with shared calendars
- Eliminate bottlenecks across document management and internal collaboration
- Alleviate the difficulties in securely accessing important data on the go/outside of the office
- Mitigate risks across multiple fronts and enforce compliance best practices
- Reduce time spent on legal accounting chores and enable automatic payments

What's preventing your team from working faster and more efficiently? How could your firm be running better?

Is it worth switching systems?

As legal technologies improve and client expectations of law firms change, it's becoming painfully clear that the systems you've perhaps been relying on for years are no longer meeting the firms' needs.

The high cost of doing nothing

We understand that switching to a new practice management system can sound like a logistical nightmare. It's not just choosing a solution; you need to ensure data migration doesn't disrupt operations, and your staff has access to dedicated training and support. But the costs of not upgrading to an up-to-date, comprehensive solution can be even worse:

- Updating and maintaining older systems will become more expensive than investing in a solution that's continually updated and supported.
- Older and disparate applications hinder productivity and efficiency — preventing your staff from instantly accessing documents and communicating and collaborating freely.
- Legacy systems are at higher risk of security and cyber attacks, and having multiple outdated technologies, makes your firm even more vulnerable.
- Important client and case information is easily misfiled or misplaced, resulting in missed deadlines.

Early warning signs your current tech stack is failing you

If your firm is facing one or more of these issues, then it's time to consider a technology upgrade:

You're missing scalable collaboration & document management

The firm is experiencing productivity or inefficiency challenges.

Quick Links

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- How to secure buy-in from attorneys and staff
- Move forward with a new, more holistic solution

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EARLY WARNING SIGNS:

- Your staff still relies on passing spreadsheets, which are extremely error-prone.
- No single source of truth; document organization and management is a free-for-all.
- Outlook is the go-to tool to file, track, and manage matter and case information.

EARLY WARNING SIGNS:

- Day-to-day dashboards are messy, and tedious tasks are plaguing your team.
- Client intake often results in incomplete or inaccurate information
- Current tools cannot do everything the firm needs them to do, therefore, requiring that many time-consuming tasks remain manual.

Your firm has 'Frankenstein-ed' a mix of applications.

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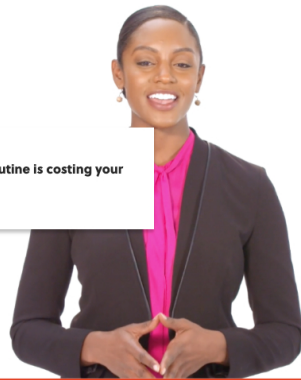
You're spending excessive amounts of time on legal accounting chores.

EARLY WARNING SIGNS:

- Your staff organizes firm data by client code, then inputs it into a billing system that resembles a spreadsheet.
- Since time and invoicing is manually managed, your firm falls victim to inaccurate billing.

▶ **How your normal routine is costing your firm money**

Maybe your firm isn't suffering from a significant issue, and your current software is "okay." After a while, "okay" solutions can turn into substantial problems that drain your firm's resources and hold it back from achieving peak productivity and competitive client service. So, there's no better time than the present to evaluate the current state of your firm, and think about long-term solutions—to determine what, if anything, can stay, and what needs upgrading so your firm can continue moving forward.

How to secure buy-in from attorneys and staff

Onboarding any new system is tough, but it can be made easier. Communicating early on how a legal practice management solution can positively impact day-to-day operations makes getting buy-in a breeze. Even so, there are still common objections you'll likely encounter, which we've outlined below.

➕ **"We've been using our current solution for years and everyone is used to it."**

➕ **"Switching software is too expensive."**

➕ **"Implementing a new solution will take too much time."**

➕ **"Our employees and attorneys are already trained on our current solution—it'll be too complicated to retrain them."**

➕ **"Our current solution already has those features."**

Move forward with a new, more holistic solution

An end-to-end legal practice management software (LPMS) systems like Zolosuite or AbacusLaw will provide your firm with all the hardware and software it needs—from client intake, best in class matters and document management, to sophisticated billing and accounting — in one single solution. No more program jumping or incompatible systems — you get a simplified, centralized solution that provides all of the following benefits (and more)
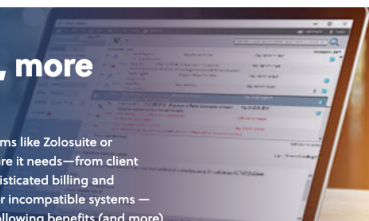
Centralization of all data and information into one hub

You can't afford to lose, misplace, or misfile documents—and that's much more likely to happen if you have multiple systems and applications for data and file storage. The best legal solutions operate as a central hub for all client, calendaring, task, and billing information, tying everything to a single case record. The better your access, management, and control, the more time your staff and attorneys will have to do their jobs.

You also get more effective data capture at a large scale. Once all of your processes are going through the software, it can pull data to generate insights to identify new client opportunities, discover areas for improvement, build stronger cases, and more.

Increased productivity and efficiency due to automation

There is a growing need for tools that streamline and simplify time-consuming day-to-day tasks and processes, giving your staff and attorneys back valuable work time.

Take document management, an ongoing manual process that can be a major drain on time. A good LPMS system makes it easier to generate, assemble, and pre-fill documents by using templates that automatically pull information from client and case records. Other perfect candidates for automation include scheduling, off-boarding, billing, and invoicing.

Improved accounting & payment processes

Legal time, billing, and accounting capabilities are a necessity in every law firm to ensure accurate billing and avoid costly delays. But the timesheets don't lie: tasks like collecting payments and generating invoices eat up huge chunks of non-billable hours.

Legal software can automate most accounting processes, taking over the management of timesheets, expense reports, templates, tax preparation, and electronic signatures. Plus, most legal time, billing, and accounting software seamlessly integrate with secure online payment processing software for easier invoicing. No more waiting for payment via mail—now you can accept payment options like credit cards, e-Checks, and money from Trust & Operating Accounts.

Better client-attorney relations & satisfaction

Help establish transparency for your clients with a secure client portal that provides easy access to their documents, billing, appointments, case tasks, and more. This presentation of self-service options allows both parties to move seamlessly through the legal process while managing other tasks.

Increased mobility with easier, secure remote access of important information

With so many attorneys and staff working from homes and courtrooms, secure access is critical. The right legal software solution will enable everyone to work from anywhere on virtually any device, while meeting the security standards that clients and bar associations demand.

Integration with existing software

Most LPMS solutions are built to integrate seamlessly with your current systems so all the different parts work together. You should confirm that your chosen solution is compatible with your current software to be sure, but it's very likely that it will be.

Think back to how an LPMS system can automate document management. Once your LPMS system is set up, it can take document templates and automatically pull on client and case records for a head start on filling those documents out. Your legal management solution could also integrate with a calendar program like Office365 to automatically add new appointments, set up recurring events, and sync necessary case information with upcoming appointments.

The fewer platforms you have to integrate, the more smoothly your unified practice management solution will run. The ideal balance is a core system that integrates seamlessly with software like O365, Quickbooks, and Docusign to form a complete solution.

Dedicated software training

The solution you choose will only be as good as the training it comes with. Without effective training, you'll have wasted a lot of money right out of the gate. The chance of human error increases if your attorneys, paralegals, and other team members are not adequately trained. They'll likely choose to devise inefficient shortcuts and workarounds instead. Make sure you consider the following:

- Is training provided by knowledgeable experts?

- Will you get hit with extra fees if you want more in-depth training or a quicker response from support?

- Does the vendor distinguish between adoption (introductory) training and troubleshooting support? (We do!)

- Is the software intuitive—easy to navigate and understand?
  Will the solution integrate with your existing technology? Does it offer mobile applications?

Whatever your firm's size, practice area(s), or specific challenges, we have a legal solution for you

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