YOU DON'T WANT PRACTICE MANAGEMENT SOFTWARE

You Want a Practice Management Software Platform

By Richard Marx

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Looking at the title to this article, you may be asking yourself, okay, what's the difference between practice management software and a practice management software platform?

Glad you asked.

Well, you may have noticed that a lot of software these days integrates with other software. Let's get the technical stuff out of the way right here. They are called add-ins, extensions, application program interfaces (APIs), synchronizations, integrations, and more. You have them and may not even know it. If you use Outlook, there are a bunch of add-ins lurking around from Microsoft, Adobe, Facebook, your practice management software, and who knows what. I have 15 add-ins sitting in my Outlook program right now. Use the Google Chrome browser? Here, they are called extensions. You will see the likes of Adobe, Amazon, Dropbox, McAfee, and, yes, possibly your practice management software. Guess what? You may need to manage your add-ins. I know, you thought it would never come to this.

It is time to rethink this whole thing of how we are going to use software to get the job done. That's why I want to introduce you to the Practice Management Software Platform, or PMSP. Okay, I just made that up. Think of a car with lots of options. Buy the wrong car and it really won't matter what options you choose. Buy the right car and leave off the options and you may not be getting your money's worth. "What, you wanted a bumper with that?"

In an article for *GPSolo*'s September/October 2016 issue, I wrote about having an Awesome Database (tinyurl.com/y7omsk5t). Let's think of it as your "home base." You should have a single place to enter and interact with your data. Contacts, matters, calendars, tasks, documents, and, yes, billing—all at your fingertips in a single system that you have learned how to use. Be careful, many of these other integrations want you to enter data into their system. If you wander too far from "home base," you might get lost.

Here are some ideas for software integration—just a few of the biggies out of hundreds of offerings.

DOCUMENTS

Management: The software should name and file your documents for you. Look for features that organize the documents by matter/folders/filenames. This needs to happen for documents you generate and receive. Yes, let's scan documents and file them with your contacts and matters.

Assembly: Remember the "home base" is where you put your data, so now we want those names, addresses, and more to merge with our documents. Is cutting and pasting really that much fun? I don't think so.

E-MAIL AND ATTACHMENTS

Let's get those e-mails out of the in-box and into your "home base." Your in-box is not a place to store e-mail. It is where the mail is delivered, and it is your job to get those annoying communications out of the in-box and filed with your contacts and matters. While you're at it, you might as well be filing the attachments into your document management system. What about billing your time as you are working with the e-mails? Some genius must have thought up that one.

DIGITAL SIGNATURES

Let's integrate your documents along with your contacts and send out a secure document link to have signed. It gets signed, submitted, and returned to your "home base."

There's a whole new world out there, and it is called integration.

CLIENT PORTAL/INTAKE

Don't call me lazy, but I want my clients to fill out information that I then can have imported directly into my database. Client collaboration goes beyond this simple concept and includes notification of events, tasks, invoices, documents, and more. You can provide your clients with their own "home base" with all the above in one place. Client portal dashboards give your clients a small piece of your software and put what you share at their fingertips. They are going to love you for it.

MOBILITY

This comes in all flavors. Your management software may already have a feature for accessing from your phone and tablet devices. You really should be able to do on your mobile device most things that you do on the office computer: add/update contact info, manage calendar and calls, bill your time, review documents, update matters, and more. Maybe you need to work remotely from a location outside your office.

And what about mobility as a feature for your clients? Yes, that client portal needs to be available from a variety of devices. Can clients interact with your firm from their phone? In my January/February 2017 *GPSolo* article, "Law Office Technology Prognostications for 2017" (tinyurl.com/ybq335pu), I discussed that we are trending toward doing most everything on our phones. I did say most everything. No, I didn't write this article on my phone—I have slow thumbs.

We may be talking about cloud hosting—yep, I said it. Hosting "in the cloud" is not the same as cloud-based software. Think of this as having all the programs you use in your office moved to servers that you then access through the Internet. Typically, you rent servers and have virtual workstations set up that allow you to log in. Often the hosting company also provides IT support as part of your subscription.

RESEARCH

Why not make research easily available by integrating with your matters? Research should be easily retrieved and shared. I mean, if someone in your firm has already done the work, why start over?

CALL LOGGING

If you have someone answering the phone, please don't tell me you are getting the carbon copy off the phone memo pad—you should at least be getting the original. Actually, you can have calls logged, even if you are outsourcing to a virtual receptionist. And there may be a big hole in your billing. There's a good chance you're not capturing billable time from calls. Whether they come to your office, cell phone, or are answered by a virtual receptionist, there's an integration to directly log these calls to your "home base." Once logged, you can bill—cool, huh?

TIMEKEEPING AND BILLING

Okay, I don't really care how you get paid, you need to keep track of your time. I do care about how I get paid, so I want to track my billable and non-billable time. If you don't measure it, you can't manage it. Integration at this level can be crucial. You perform billable actions and hopefully are entering this information into your "home base." Why not use those events, tasks, calls, e-mails, notes, documents, whatever to generate your timekeeping? I know some of you love your paper timesheets, probably because someone else is doing the entering. Guess what, that person has better things to do as well. How much time did you write down? Are you sure? You need timers. Timers everywhere. Here comes a call. Timer. Working on a document. Timer. Writing an article for *GPSolo.* Timer.

After you solve the timekeeping issue, you still need to get your bills out the door. See, I said "out the door"—how old-fashioned of me. How about getting your bills "out the Internet?" Sending invoices as secure links with online payment options is a great place to start.

ACCOUNTING

All that stuff above needs to sift down to accounting. Ideally, I would like to have one system to bill my time, pay my bills, do my taxes, track my trust accounts, and manage my practice. I still have not found a single program that handles all these needs—and double-entry simply will not cut it. That said, it is easier than ever to have a great billing program in your practice management software that integrates with your accounting software.

MARKETING

Here we are again with the measure and manage thing. With two simple measures of keeping track of the source of a prospect and the outcome, one of my client law firms adjusted its marketing and saved $10,000 a month. If you want more, it is out there. You can set up different campaigns by assigning different phone numbers that track demographics based on the number called. Then the integration allows for tracking and reporting the results. Automated follow-up systems and newsletters also can be integrated. Again, it's nice to use your data and capture useful information in your "home base."

AND ALL THE REST

Specialty software is becoming available at a staggering pace. One of my vendors does a great job of encouraging outsiders to write integrations using their API (remember, this is software that lets the two programs talk to each other). The result is that they now have more than 50 integrations. In addition, you can find online software that works both sides of the equation. One company has brought together 750 integrated programs. Do you want to enter a contact in your "home base" and have it added to your newsletter software? How about generating a form your client can complete that then populates contacts and matters in your "home base"? Maybe you are looking for help with e-discovery or practice-specific software for bankruptcy, immigration, or trademarks? I could go on and on and on, but they only gave me 2,500 words.

This is a good place to mention that you need to manage your add-ins. Is Outlook or Google opening up at a snail's pace? You may have add-ins and extensions trying to open and slowing down your software—like the Outlook Social Connector or Amazon Assistant for Chrome. Turn off anything you're not using. Look for those little checkboxes to disable.

So, what is the strategy? Take time to look at the big picture. If you only focus on one part of your practice, say document management, you may get a great program only to realize you forgot about scanning, merging, digital signatures, sharing, etc. Over time, you may have collected too much software with lots of overlap and wasted time and money.

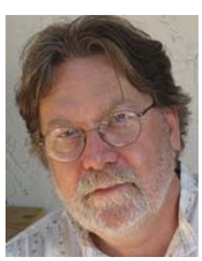
Take inventory. Start at home and make sure you know what is capable with what you already have. I often hear, "What? I didn't know my software could do that." Make sure you have a great foundation for your "home base." Returning to our pervious analogy, you may need to consider whether you bought the right car. Next, find out what features your software already offers by way of integrations, add-ins, synchronizations, etc.

Get a plan. What do you really need? When I work with a new client, we do something called "Capture, Track, and Share." It is a meaningful way to look at your workflow. I really mean it. Here is the short version.

- **Capture.** How does information come into your firm? The phone rings, you get an e-mail, someone sends you something in the mail. Or maybe you hear someone yelling from down the hall and you are pretty sure they are yelling at you. Are you doing the best you can to efficiently capture the data you need? Do you have all the details? Is the information accurate? Don't forget to include outside resources such as research, court rules, etc.
- **Track.** What do you need to track? Where is our new business coming from? Did that document get signed and returned? When was the last time we were in contact with this client? What deadlines are coming up? What is our most profitable practice area? Did the tasks I delegated get completed? Who owes us money? How much money? Who's on first? What's on second? Sorry, I got carried away. You get the idea. This is important stuff.
- **Share.** What and with whom do you need to share your data? Well, this comes in many different flavors. Let start with all of you at the firm. Communication within an office is possibly the biggest improvement opportunity to creating more time. Okay, we don't really create the time, but we save time to do more important things. You will need a great delegation system and a great notification system. Then turn the notification system off. Not really—but if you are using e-mail with pop-ups to message your coworkers, then you are wasting your time and the time of the person you e-mailed. I audited a small firm of eight people and determined they were interrupting each other no less than 450 times a day. And, of course, wondering why no one seemed to be able to get their work done. Delegate and reduce the pop-ups and see what happens with your time. Sharing outside your office obviously includes your clients, but don't forget other case-related parties—outside counsel and anyone else who has a need to know something about your data. I had better mention sharing with other software as it is the topic of this article.

CONCLUSION

There's a whole new world out there, and it is called integration. With the right platform and the right add-ins, you might just have yourself one heck of a law firm. Ask around and see what is working for your colleagues. And maybe, just maybe, hire a consultant. I can say no more. ■



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