

What To Look For In A CRM & Practice Management Software

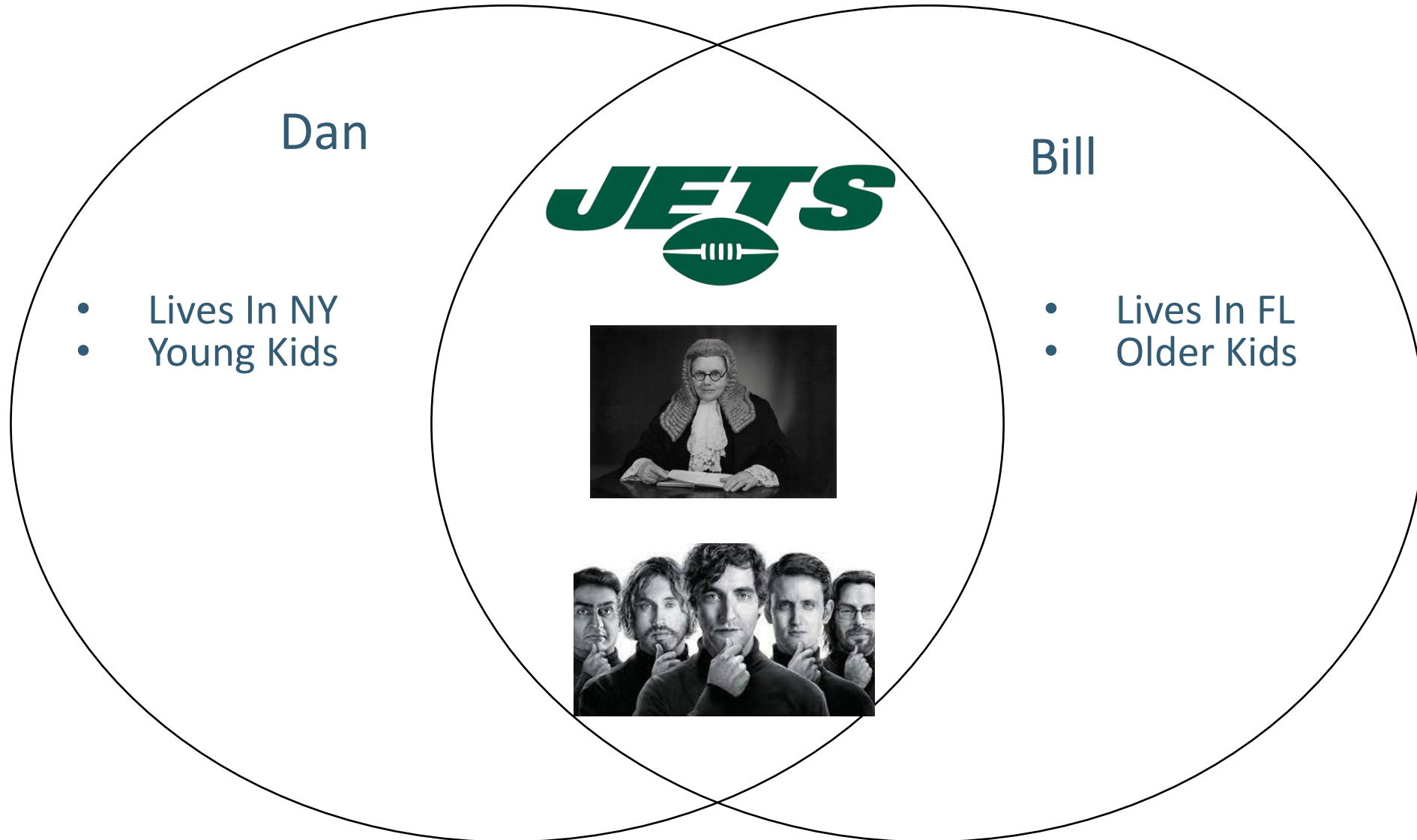
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A Little About Bill & Dan



What We Will Cover

- Leads (Before they become a client) vs. Clients
- 16 Criteria for you to figure out what matters for your practice!
- Bill's Best Discussion of 5 Software Programs for those 16 Criteria
 - Clio
 - Leap
 - Practice Panther
 - My Case
 - Lawmatics

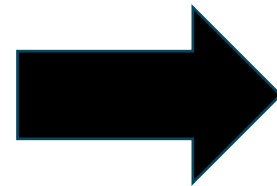
Disclaimer

- We are not associated with any of these programs
- These are just the opinions of 2 attorneys/tortured Jets fans
- Both Daniel and Bill have technology backgrounds and programming backgrounds.
- Daniel Miller has used Clio, Clio Grow, Leap, and Lawmatics. He currently uses Lawmatics exclusively
- Bill Dertinger is certified in TM, TS, HD and PCLaw and has had a demo of each of the 5 programs being discussed today
- We ask that you hold your questions about the Jets and the practice management software until the end or after the program

The Elder Law Pipeline

Pre-Client Or Lead or
Potential New Client (PNC)

- Marketing
- Sales



Converts to

Servicing Current Clients

- Production
- Customer Service

Pre-Client Or Lead- 8 Criteria

1. Marketing
2. Return on Investment (ROI) Tracking
 - a. How were you found?
3. Setting Up Appointments
4. Information **to** Potential Clients (Glide Path)
5. Information **From** Potential Clients
6. Retainers
7. Payments/Credit Cards
8. Integration with Document Drafting Software

Pre-Client Or Lead

- Marketing
- Sales

1. Marketing

- Elder Law Clients Have A Problem
 - Worried about long term care
 - Need to probate a will
 - Need a lawyer to help create/administer their trust
 - Would like to get a home health aide through Medicaid
 - Need a Guardian Appointed for a loved one
- How do you tell potential clients you have the knowledge and expertise to fix their problem?



1. Marketing

- Newsletters
- Content give away on a website
 - Follow up Emails or calls
- Following up with old clients
- Referral Emails/Calls



2. ROI Tracking

- Of your marketing efforts, what is working?
 - Tracking your Return on Investment
 - Facebook Ads
 - Referral Sources
 - Yelp
 - Google Ads, Avvo, Super Lawyers
 - Seminars
- How are people finding you? Tracking this can help an incredible amount!
- Ex. Paid \$500 for Facebook adds on Medicaid Application
 - 5 potential new clients called
 - Of those 5, 2 were good potential (A clients)
 - 1 became a client and paid \$7,500.
 - My Profit is \$7,000
 - My ROI = Profit/Cost of Investment X 100% $(7,000/500) * 100\% = 1,400\%$



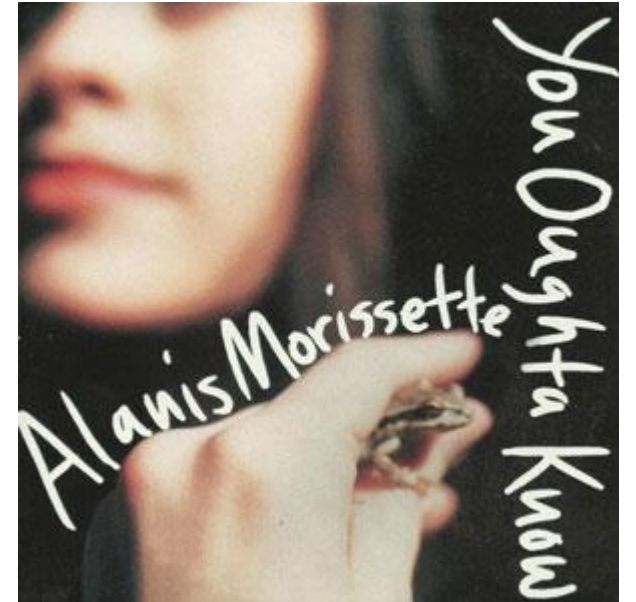
3. Setting up Appointments



- Now that your potential clients know about you, and you deciphered how they learned about you, how do they meet you?
 - Do it themselves vs. an employee schedules an appointment for them
 - Paid vs. Unpaid Consult
 - Zoom vs. In Person
- Sending Email reminders of appointments?
- Texts?
- Calling to remind of appointments?

4. Information To Potential Clients

- Before your consult, what do you want your clients to know?
- Pre-Consult Education
 - Estate Planning- POA, HCP, Trust- How each of them work
 - Estate Administration/Probate- The process
 - Medicaid- The qualifications
 - Guardianship- The process
- What to Expect At The Consult
 - How to get there, where to park, what trains to take
- Through Email or Mail to Client?



5. Information From Potential Clients

- What do you want to know from the Potential Client before they speak with you?
- Sent in the form of a Questionnaire
- Online Forms or pen and paper questionnaires?
 - Estate Planning- Family Tree/Approx Assets
 - Estate Admin- Distibutees/Will or Administration/Assets/Executor/Conflict
 - Medicaid- Community or Institutional/Approx Assets & Income
 - Guardianship- Proceeding Started, Functional Limitations, Relationship



"Has your address, insurance, or family relationship changed since you started filling out these forms?"

6. Retainers/Engagement Agreements



Now that you have had the consult, they want you as an attorney and you want them as a client.

- First, standardize retainer per practice area
- Next, allow room for changes
- Docusign vs. Pen & Paper
- Dan's practice
 - Fill out an internal form with what services are provided, the costs, and any changes to the scope of representation. Submit the form.
 - Docusign retainer is sent to client. The software knows what practice area and what retainer to send out.
 - Client can esign retainer
 - Both myself and client get a copy of the retainer automatically
 - Sending out retainers can take less than two minutes

7. Payment/Credit Card

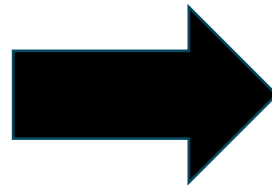
- How/when are you going to get paid according to the retainer agreement?
- Credit Card/Zelle/Check
- Tracking Payments
 - Automatically
 - Manually
- Money into Operating/Retainer Account?



8. Integration with Document Drafting Software

- Can I use the information provided by the client and captured by my system without having to have someone/myself reenter it?
- 3rd Party Integration- Does your software play nice with other software?
- Not all integrations are created equal

Converting from a potential client to an actual client



Converts to



- Conversion rate= # of consults/# of clients retained
 - Important metric

Bill's Best Intake Overview

- **Lawmatics** - focuses on the Intake half of our equation
 - Integrates with several case management programs (Clio is tightest)
 - Links with Facebook, LinkedIn, etc. to help determine client acquisition \$
 - Solo to 500 users – 10 is sweet spot
 - Time and billing is a weakness
 - COST – Solo \$259, Plus (5 users) \$399 and Premium (20 users \$1199)
 - + more contacts, automation, eSignatures, custom forms and reports
- **Clio Grow** - reminds you to do something rather than automating it
- **Other 3** – integrated, but not same level of features

Practice Management

1. Task Management For Workflow
2. Key Performance Indicators (KPI's)
3. Document Management
4. Email Management
5. Time Track on Documents/Emails
6. Client Requests/Portals
7. Billing
8. Integration with Phone Systems

Servicing Current Clients

- Production
- Customer Service

Time Matters – RIP?

- Brief history
 - The two Titans (Lexis v West)
- Upside down marketplace
- Premise vs Cloud
- Tailored suit vs Off the rack
- All in one vs Best of breed
- No one size fits all
- Try before you buy

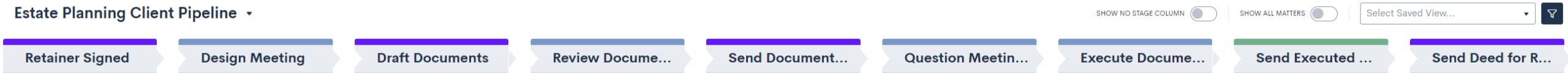


1. Task Management For Workflows

- Now that they are your clients, what is next?
- Process is key
- Who accomplishes each task?
- How does the next person get notified the task is done?
- Replicate the process
- Kanban Boards vs. Not

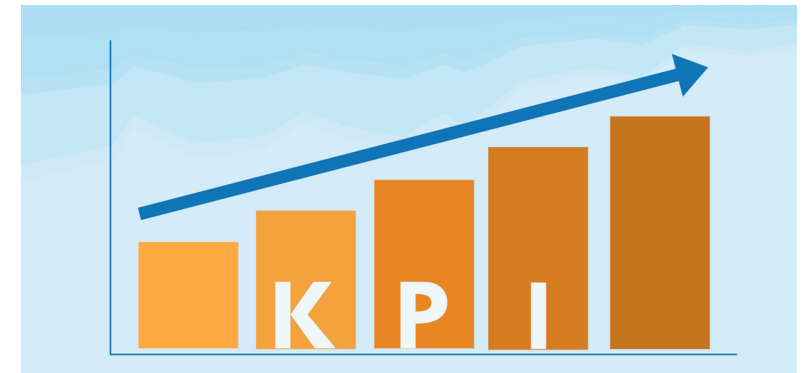


1. Task Management For Workflows



2. Key Performance Indicators (KPI)/ Reporting

- What statistics matter to your law firm & can your practice management software give you those statistics?
 - Cost Per Matter
 - How long is each person working on a file?
 - How long does it take to move the file from start to completion?
 - Is this a flat rate or billable matter?
 - If flat- is it profitable?
 - If billable- how many hours on average are billed for a type of matter?
 - Average Case value
 - Number of Active Matters
 - Staff Productivity
- Reports created by Practice Management software can give you an idea on how your business is running and provide indicators what is working and what is not.



3. Document Management

- Where are your files stored?
 - Documents
 - Emails
 - .PDFs
- Version Management
 - Who is making changes to a file?
- Cloud Based?
- Upload every time or automatically saved?
- Does it Integrate with other Document Management Systems?
 - Example Dropbox
- Meta data
- Forms for each document
 - Example- Template OSC for Guardianship
- **Automation**- Can documents be created automatically based on fields you enter



4. Email Management

- Can you save emails to your practice management software?
- How simple is it to store and see the emails that have been saved?
- Can you see if a recipient has opened the email?
- Can you send an email from your practice management software?



5. Time Track on Documents/Emails

- If you are running a billable model, can the software track the time you spent on documents/emails automatically?
- Are there other ways to track time spent in documents
 - Stopwatch/Timer



6. Client Requests/Portals

- Secured Place to Share Documents/Request Documents from Clients
- Simplicity of use for client/firm
- Can you assign tasks to clients in the portal?



7. Billing



- Ease of sending out Invoices
- Follow up on bill payment to clients
- Applying retainer fees to bills
- Adding Time Entries/Expenses to the Invoice
- Ease of payment by the client

8. Integration with Phone Systems

- Are phone calls logged into practice management system?
- Need a VOIP phone
- Can I make a call by clicking on a number in my practice management software?
- Example- I click on the phone number, it calls the client. I have a 30-minute conversation with them. It will show that I had a conversation with the client on that date. I can then go and bill the client for that conversation for the time on the phone and take notes as to what was said all within my practice management software.



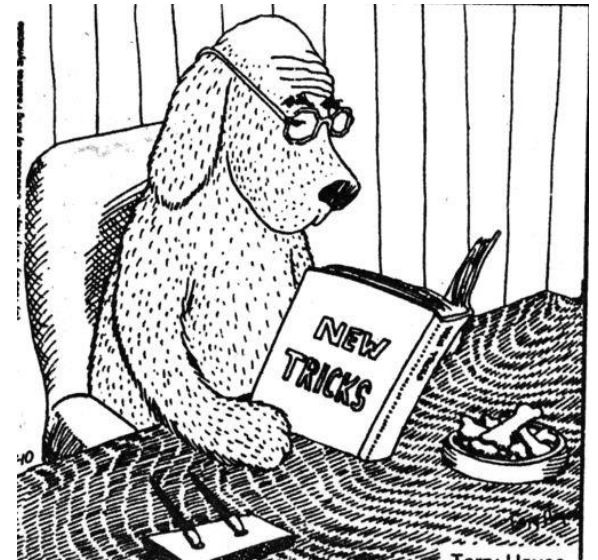
Final Thoughts- Entering into Agreement/ Leaving a Software

- Be careful on entering into agreements, you sometimes can't get out
- If all your documents are on their cloud system, how do you get them off their system if you leave their program?



Bill's Best Overview

- The devil is in the details
- Initial impression based on a demo with the vendors
- As previously stated – one size does not fit all
- Factors to consider:
 - Ease of use – implementation, consultants, training
 - Cost – software, add-ons, migration, infrastructure
 - Productivity slip – one step back, two steps forward
 - Adoption – starts from the top
 - Integration – other software (QBO) and hardware



LEAP

- Is not Time Matters Cloud
- Hybrid solution – slow, but offline capable
- No intake / client portal (coming)
- Good if starting from scratch, but rigid
- Nice redline / versioning capability
- Matter centric, no stray contacts
- Good integration with NY Court forms
- COST - \$149-\$199



LEAP

The screenshot displays the LEAP software interface for a legal matter. At the top, the browser window title is "150017 Penfold, Divorce - Contested; Penfold". Below the title bar is a navigation menu with tabs: "Details & Correspondence" (selected), "Calendar & Tasks", "Financial Summary", "Time & Fees", "Operating Account", "Trust Funds", and "Safe Custody".

Below the navigation menu is a toolbar with various action icons: "Save & Close", "New Document", "New Email", "Forms & Templates", "New Comment", "Import", "Share Document", "eSignature", "Message", "Send Document", "Send Matter", "Callback Request", "Timesheet", "Searching & Services", and "Docket Sync".

The main content area is divided into two sections:

- DETAILS:** Shows the case number "150017" with a status of "IN PROGRESS". The case name is "James Stevenson". The plaintiff is "Mrs. Sally Penfold" (Family role: Wife). The matter type is "Divorce - Contested". The defendant is "Mr. Paul Penfold" (Family role: Husband). The defendant's attorney is "Morrison & Sons". The court is "Supreme Court, Family Court". The judge is "Honorable Kathleen Thompson".
- CORRESPONDENCE:** A table listing correspondence items. It includes a search bar and a table with columns for TYPE, ITEM, STAFF, and CREATED.

| TYPE | ITEM | STAFF | CREATED |
|-----------------------|---|-------|------------------|
| | Correspondence | | |
| RECEIVED | Penfold -v- Penfold John Smith | JS | January 23, 2023 |
| DRAFT | Penfold -v- Penfold James Stevenson | JS | January 23, 2023 |
| SENT | Letter to Mrs. Penfold James Stevenson | JS | January 16, 2023 |
| SHARED VIEWED COMMENT | Letter to Family Court James Stevenson | JS | January 16, 2023 |
| SENT | Penfold -v- Penfold James Stevenson | JS | January 8, 2023 |
| | Discovery List Nicole West | NW | January 8, 2023 |

PRACTICE PANTHER

- Focus on simplicity
- Does not ship with templates. All custom
- Integrates with QBO. Accounting expected 2024
- Integrated client portal
- Intake forms do not have conditional logic
- No document management. Integrates with:
 - OneDrive, Google Drive, Box
- COST – Solo \$49 / Essential \$69 (custom fields, security roles, multiple bank accounts) / Business \$89 (eSig, LEDES, Intake, Migration)

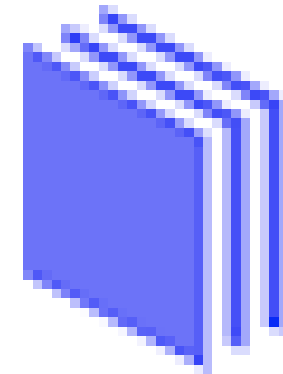


PRACTICE PANTHER

The screenshot displays the Practice Panther dashboard interface. At the top, there is a navigation bar with the Practice Panther logo, a 'New' button, a 'Start Timer' button, and user information for Joana Miles. Below the navigation bar is a search bar and a menu with options: Dashboard, Contacts, Matters, Calendar, Activities, Invoices, Time Entries, Automation, and More. The main dashboard area features a 'Dashboard' title and a 'Date Range' dropdown set to 'ALL TIME'. Four key financial metrics are shown in colored boxes: TRUST (\$192,525.50 USD), PAID (\$72,395.75 USD), TOTAL DUE (\$6,430.00 USD), and BILLABLE (\$22,455.30 USD). Below these metrics is a 'QUICK CREATE' section with icons for: New Contact, New Matter, New Event, New Task, New Note, New Call, Send Message, Track Time, Add Expense, New Intake, and New Invoice. At the bottom, there is a 'RECENT ACTIVITY' section with a search bar containing 'What's new?', a filter icon, a 'Save' button, and a pagination control showing '10 ITEMS PER PAGE' and 'NO ITEMS TO DISPLAY'.

MyCASE

- All in one at affordable price (accounting \$39)
- Client intake – not as robust as Lawmatics / Grow
- Owned by Lawpay / Affinipay
 - Nice payment link on invoices
- Less integrations than others
- Do not migrate documents
- Conflict check is more full text search
- COST – Basic \$39 / Pro \$69 (intake, custom fields, eSig, portal) /
Advanced \$89 (full text, desktop sync for docs, document automation)



MyCASE

The screenshot displays the MyCASE dashboard interface. At the top, there is a navigation bar with the MyCASE logo, a user profile for Giavanna Ippolito, and a search bar. Below the navigation bar is a menu with various categories: Home, Calendar (37), Tasks (36), Contacts, Cases, Documents (35), Billing, Reports, Communications (2), and Leads. The main content area is divided into several sections: 'Add Item' with buttons for Event, Document, Task, Lead, Contact, Case, Message, Time Entry, Expense, Invoice, and Note; 'Recent Activity' with a list of events such as 'Karen Smith (Client) logged in to MyCase about 23 hours ago via web' and 'AJ Woronovich (Attorney) updated lead AJ users (Lead) about 23 hours ago via web'; 'Alerts' with sections for 'Overdue Invoices' and 'Low Trust Balances'; 'Upcoming Events' with an 'Add Event' button; and 'Upcoming Tasks'. At the bottom right, there is a status bar showing 'Today: My hours billed 0.0'.

mycase

What's New 6 | Giavanna Ippolito | Find clients, cases, and items...

Home | Calendar 37 | Tasks 36 | Contacts | Cases | Documents 35 | Billing | Reports | Communications 2 | Leads | 3 | Add Item

Dashboard | Recent Activity

Add Item

Event | Document | Task | Lead | Contact | Case | Message | Time Entry | Expense | Invoice | Note

Recent Activity

All | Invoices | Events | Documents | Tasks

- Karen Smith (Client) logged in to MyCase about 23 hours ago via web
- AJ Woronovich (Attorney) updated lead AJ users (Lead) about 23 hours ago via web
- AJ users (Lead) completed an intake form for Potential Case: test users about 23 hours ago via web | AJ users
- AJ Woronovich (Attorney) added lead AJ users (Lead) about 23 hours ago via web
- AJ Woronovich (Attorney) commented on document Welcome letter about 23 hours ago via web | Bateman Defense
- AJ Woronovich (Attorney) uploaded a new document Welcome letter about 23 hours ago via web | Bateman Defense
- AJ Woronovich (Attorney) added case Bateman Defense about 23 hours ago via web | Bateman Defense
- AJ Woronovich (Attorney) added contact Patrick Bateman (Client) about 23 hours ago via web
- AJ Woronovich (Attorney) deleted case Bateman Defense a day ago via web
- AJ Woronovich (Attorney) closed case Bateman Defense a day ago via web
- AJ Woronovich (Attorney) updated case Bateman Defense 4 days ago via web

Alerts

Overdue Invoices

- #20150622, Jane Doe Matter
\$250.00 due 12/15/2019
- #20150600, Jones v. Jones
\$450.00 due 12/11/2019
- #20150601, Test June 18th
\$1,500.00 due 12/11/2019

[View all overdue invoices \(141\)](#)

Low Trust Balances

- Client Bruce Edge is \$5,000.00 under their Minimum Trust Balance.
- Client Adam Jones is \$1,500.00 under their Minimum Trust Balance.
- Client John Jones is \$200.00 under their Minimum Trust Balance.
- Client Kristi Reynolds is \$2,000.00 under their Minimum Trust Balance.
- Client Aaron Sanchez is \$900.00 under their Minimum Trust Balance.
- Client Bob Smith is \$1,000.00 under their Minimum Trust Balance.
- Client Karen Smith is \$630.50 under their Minimum Trust Balance.
- Client Johnson Smith Jr. is \$500.00 under their Minimum Trust Balance.
- Client Luke Sparks is \$2,500.00 under their Minimum Trust Balance.
- Client Dakota White is \$2,000.00 under their Minimum Trust Balance.

Upcoming Events [Add Event](#)

You have no upcoming events.

Upcoming Tasks

Today: My hours billed 0.0

CLIO

- Most buzz of any of the programs
- Grow (Intake) and Manage (Practice Management)
- Open API (150+ integrations)
- Good interface, feature set and security
- Solid integration with M365
- Limited offline access
- COST – Easy \$39 / Essentials \$69 (portal, document assembly, integration) / Advanced \$99 (full text, case progress dash, indexing, unlimited eSigs, priority support) / Complete \$129 (incl. Grow \$59)



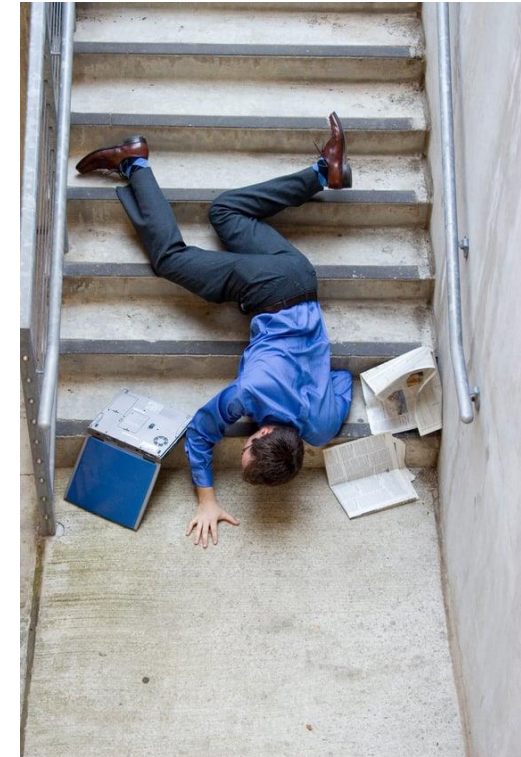
CLIO

The screenshot displays the CLIO 'Matters' interface. At the top, there is a search bar and a 'Recent' dropdown. The main content area is titled 'Matters' and features a table of legal cases. The table has columns for 'Actions', 'Matter', 'Client', 'Practice area', and 'Open date'. Each row represents a case with an 'Edit' button and a dropdown menu. The cases listed include various legal matters such as 'Sally Whithead, LLC Check & Closing of Home Purchase', '0000 ABC Holdings, 500 M. Southeast Parkway Purchase', and '0005 Person Power of Attorney Appointment'. The interface also includes a sidebar with navigation options like 'Dashboard', 'Calendar', 'Tasks', and 'Matters', and a bottom status bar showing the user's name 'Beth Kovan' and a 'Collapse' button.

| Actions | Matter | Client | Practice area | Open date |
|---------|--|----------------------|-----------------------|------------|
| Edit | 0000 Sally Whithead, LLC Check & Closing of Home Purchase | Sally Whithead | Real Estate | 03/15/2018 |
| Edit | 0000 ABC Holdings, 500 M. Southeast Parkway Purchase | Sally Whithead | Corporate | — |
| Edit | 0005 Person Power of Attorney Appointment | Jackson Person | Elder Law | 03/08/2018 |
| Edit | 0026 Thompson, Wanda's Termination | Lara Thompson | Employment / Labor | 08/06/2018 |
| Edit | 0007 Person, DUI First Offense | Dana Seaman | Criminal | 05/30/2018 |
| Edit | 0006 Seaman, LLP Filing | Greg Seaman | Business Formation | 04/13/2017 |
| Edit | 0009 Bobster, Social Security Disability Appeal | Jack Bobster | Administrative | 07/14/2018 |
| Edit | 0010 Hubster, Probate Representation on the estate of Jack Bobster | Jack Bobster | Wills & Estates | 08/14/2018 |
| Edit | 0005 Hubster, Database Enforcement | Jack Bobster | Intellectual Property | 07/14/2018 |
| Edit | 0012 Hubster, Chapter 7 Filing | Jack Bobster | Bankruptcy | 07/14/2018 |
| Edit | 0003 G. Provenzano, Permanent Residence Green Card Application | Natalie G. Provenzo | Immigration | 07/15/2018 |
| Edit | 0024 Sally Whithead, Dissolution, Children, Sole Custody & No Real Estate | Sally Whithead | Family | 07/21/2018 |
| Edit | 0025 Hubster, DUI | Jack Bobster | Criminal | 07/21/2018 |
| Edit | 0028 Hubster, Breach of Contract Litig | Jack Bobster | Civil Litigation | 07/28/2018 |
| Edit | 0001 Hubster, Thompson, Blockchain, Tech Lit | Guy Hubster, Thom... | — | 08/07/2018 |
| Edit | 0008 Hubster, Thompson, Blockchain, Tech Lit, Attention, Guy Hubster, Thompson | Guy Hubster, Thom... | — | 08/07/2018 |
| Edit | 0029 Hubster, Thompson, Blockchain, Tech Lit, Attention, Guy Hubster, Thompson | Guy Hubster, Thom... | — | 08/07/2018 |

Next Steps

- Prioritize which of these 16 points matter to you.
- Write them down from 1-16
- Then test drive some practice management software
- Figure out which software hit your priorities
- Grill the reps
- Pick your practice management software
- Work to implement the software
 - This can and will take months



Questions?

- And possibly some answers