What To Look For In A CRM & Practice Management Software

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A Little About Bill & Dan

Dan

- Lives In NY
- Young Kids

Bill

- Lives In FL
- Older Kids

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

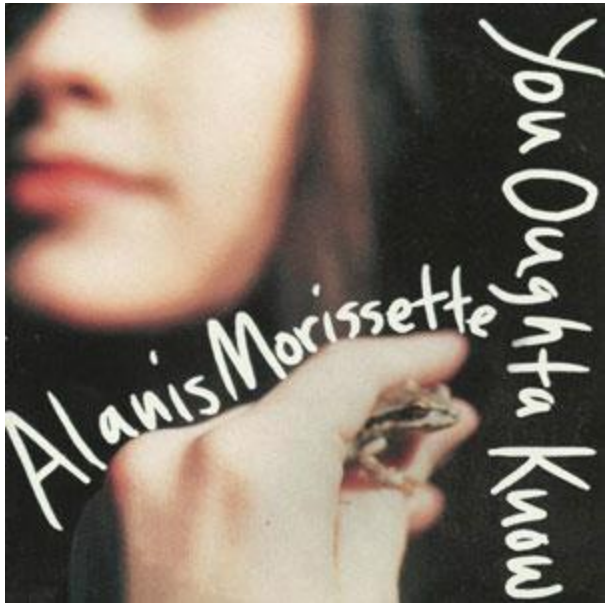
- Of your marketing efforts, what is working?
  - Tracking your Return on Investment
    - Facebook Ads
    - Referral Sources
    - Yelp
    - Google Ads, Avvo, Super Lawyers
    - Seminars
- How are people finding you? Tracking this can help an incredible amount!
- Ex. Paid $500 for Facebook adds on 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 knows 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

- Marketing
- Sales

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

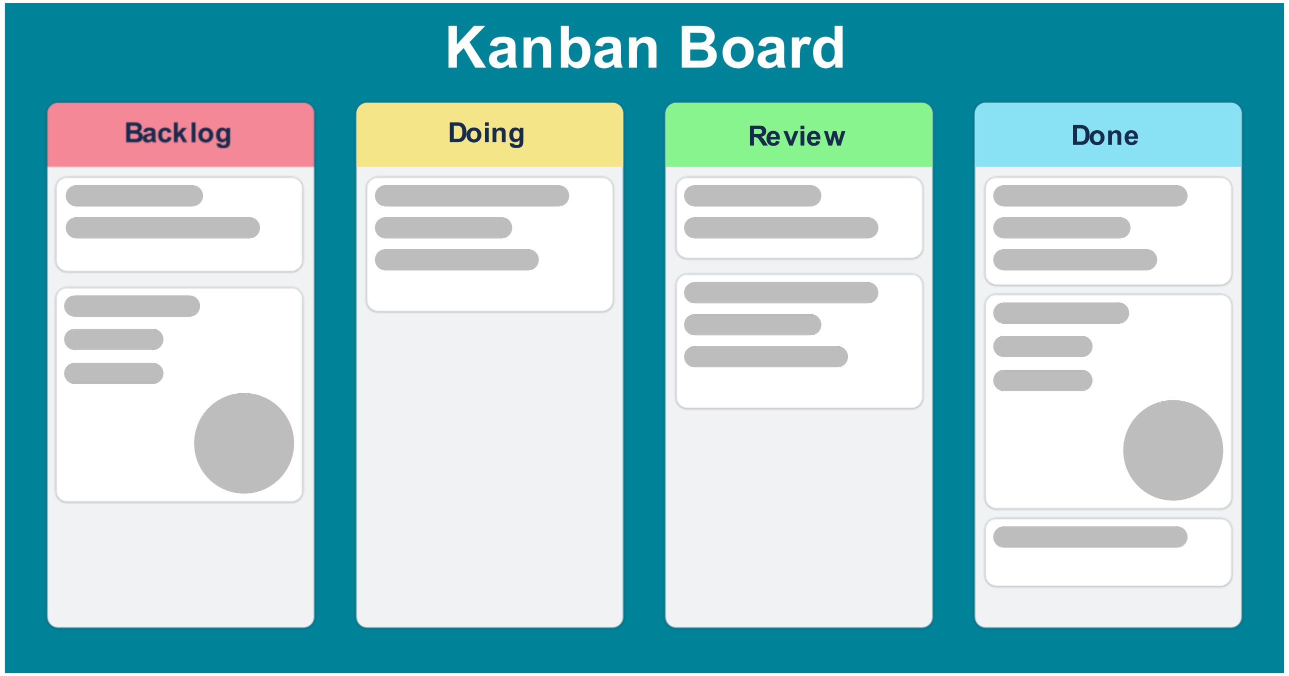
- Production
- Customer Service

Time Matters – RIP?

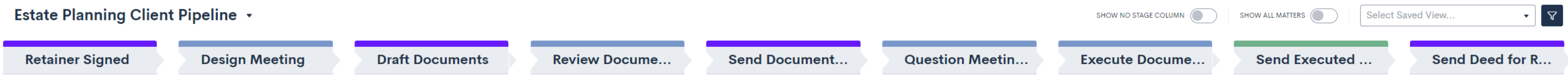
- Brief history
    - The two Titans (Lexis v West)
- Upside down marketplace
- Premise vs Cloud
- Tailored suit vs Off the rack
- All in one vs Best of breed
- No one size fits all
- Try before you buy

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

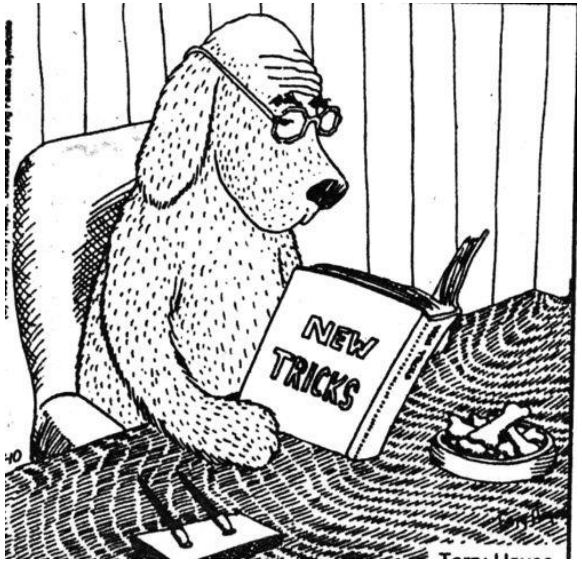
- Are phone calls logged into practice management system?
- Need a VOIP phone
- Can I make a call by clicking on a number in my practice management software?
- Example- I click on the phone number, it calls the client. I have a 30-minute conversation with them. It will show that I had a conversation 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

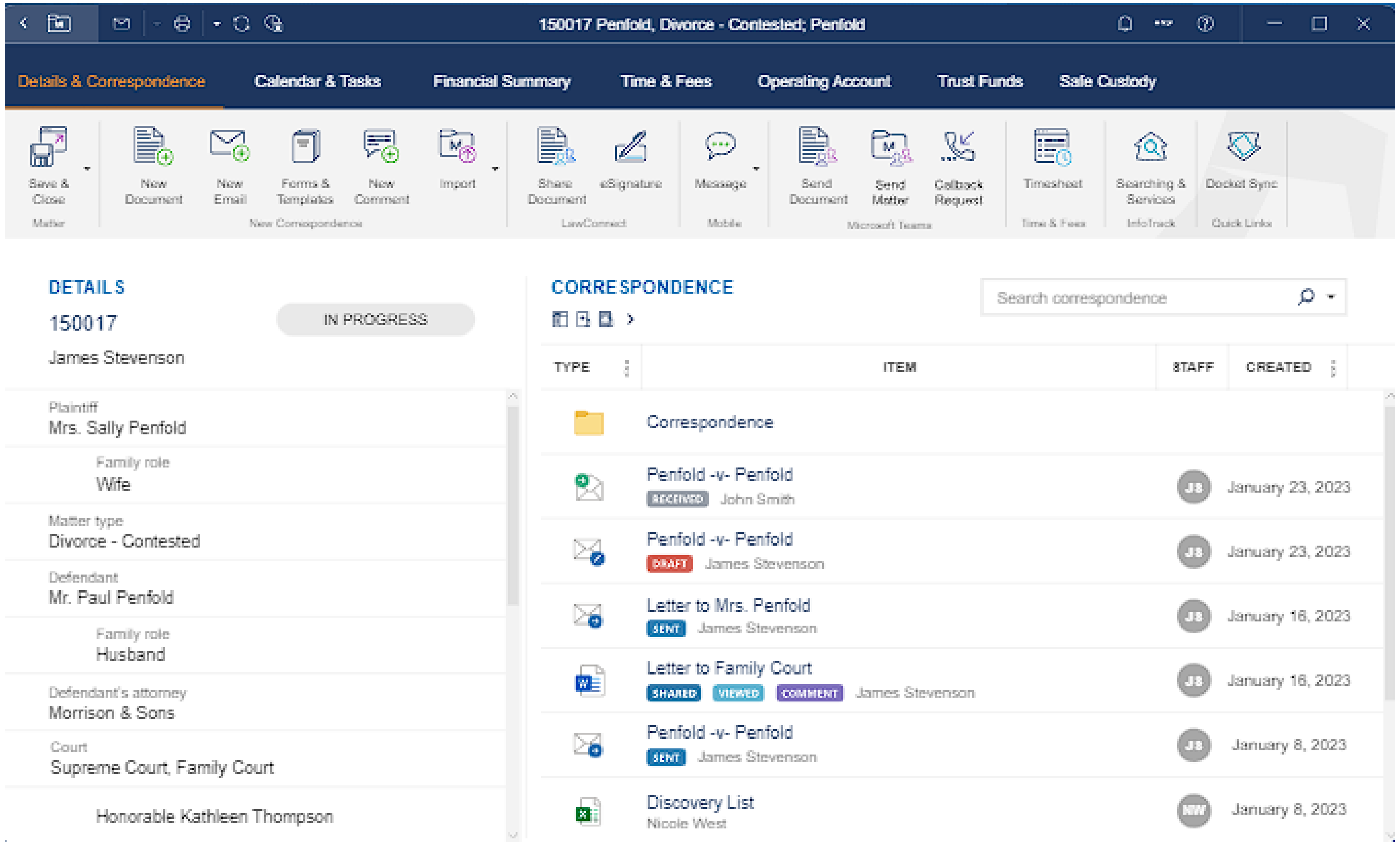
- The devil is in the details
- Initial impression based on a demo with the vendors
- As previously stated – one size does not fit all
- Factors to consider:
  - Ease of use – implementation, consultants, training
  - Cost – software, add-ons, migration, infrastructure
  - Productivity slip – one step 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

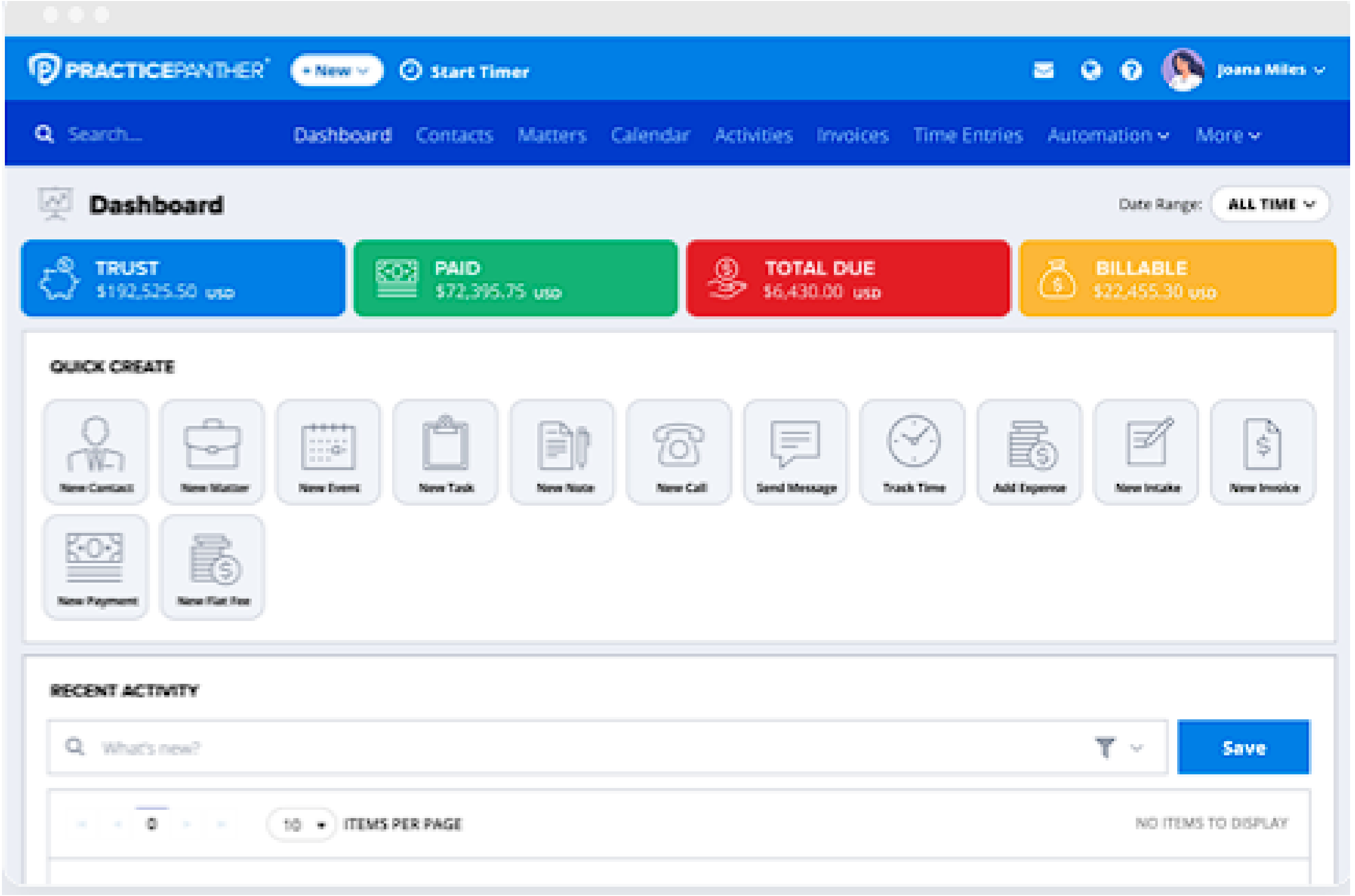


150017 Penfold, Divorce - Contested; Penfold
Details & Correspondence
Calendar & Tasks
Financial Summary
Time & Fees
Operating Account
Trust Funds
Safe Custody
Save & Close
New Document
New Email
Forms & Templates
New Comment
Import
Share Document
eSignature
Message
Send Document
Send Matter
Callback Request
Timesheet
Searching & Services
Docket Sync
DETAILS
150017
IN PROGRESS
James Stevenson
Plaintiff
Mrs. Sally Penfold
Family role
Wife
Matter type
Divorce - Contested
Defendant
Mr. Paul Penfold
Family role
Husband
Defendant's attorney
Morrison & Sons
Court
Supreme Court, Family Court
Honorable Kathleen Thompson
CORRESPONDENCE
Search correspondence
TYPE
ITEM
STAFF
CREATED
Correspondence
Penfold -v- Penfold
RECEIVED John Smith
January 23, 2023
Penfold -v- Penfold
DRAFT James Stevenson
January 23, 2023
Letter to Mrs. Penfold
SENT James Stevenson
January 16, 2023
Letter to Family Court
SHARED VIEWED COMMENT James Stevenson
January 16, 2023
Penfold -v- Penfold
SENT James Stevenson
January 8, 2023
Discovery List
Nicole West
January 8, 2023

PRACTICE PANTHER

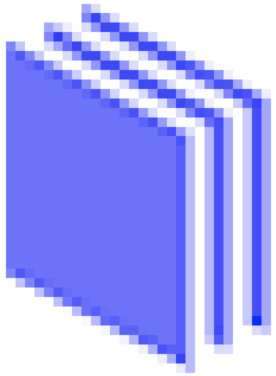
- Focus on simplicity
- Does not ship with templates. All custom
- Integrates with QBO. Accounting expected 2024
- Integrated client portal
- Intake forms do not have conditional logic
- No document management. Integrates with:
  - OneDrive, Google Drive, Box
- COST – Solo $49 / Essential $69 (custom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

PRACTICE PANTHER

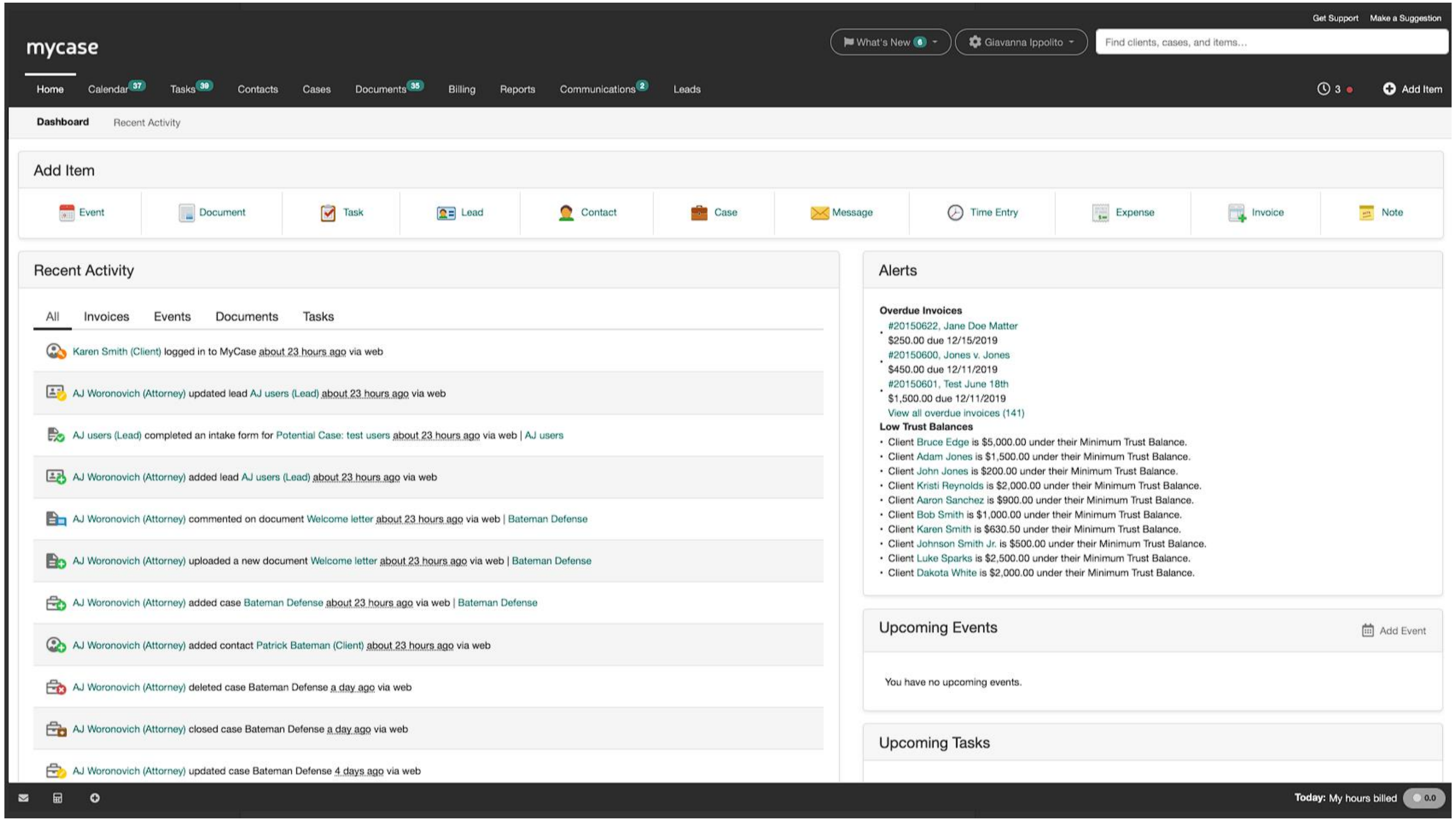


MyCASE

- 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)



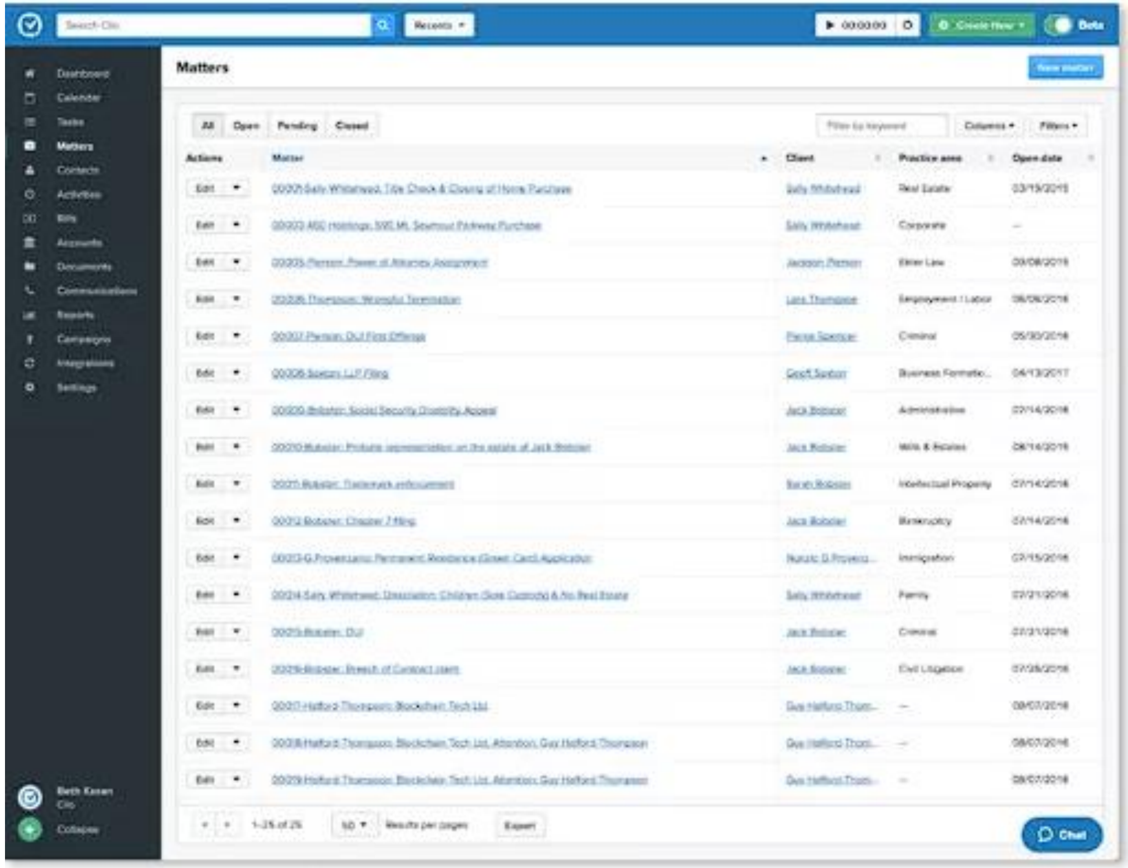
MyCASE


Get Support
Make a Suggestion
mycase
What's New 6
Giavanna Ippolito
Find clients, cases, and items...
Home
Calendar 37
Tasks 30
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

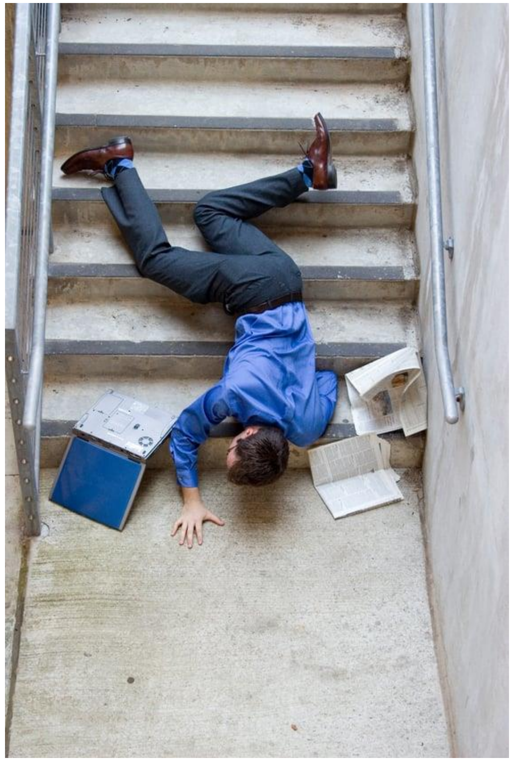
- Most buzz of any of the programs
- Grow (Intake) and Manage (Practice Management)
- Open API (150+ integrations)
- Good interface, feature set and security
- Solid integration with M365
- Limited offline access
- COST – Easy $39 / Essentials $69 (portal, document assembly, integration) / Advanced $99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

CLIO


Recents
Beta
Matters
Dashboard
Calendar
Tasks
Matters
Contacts
Activities
Bills
Accounts
Documents
Communications
Reports
Campaigns
Integrations
Settings
All
Open
Pending
Closed
Actions
Matter
Client
Practice area
Open date
Chat

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