

# Selecting Your Practice Management System

## Practice Management Track



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# Agenda

- ❖ Introductions
- ❖ Practice Management Systems -- Defined
- ❖ Overview of COTS CMS Systems
- ❖ Selection Methods
- ❖ Q&A

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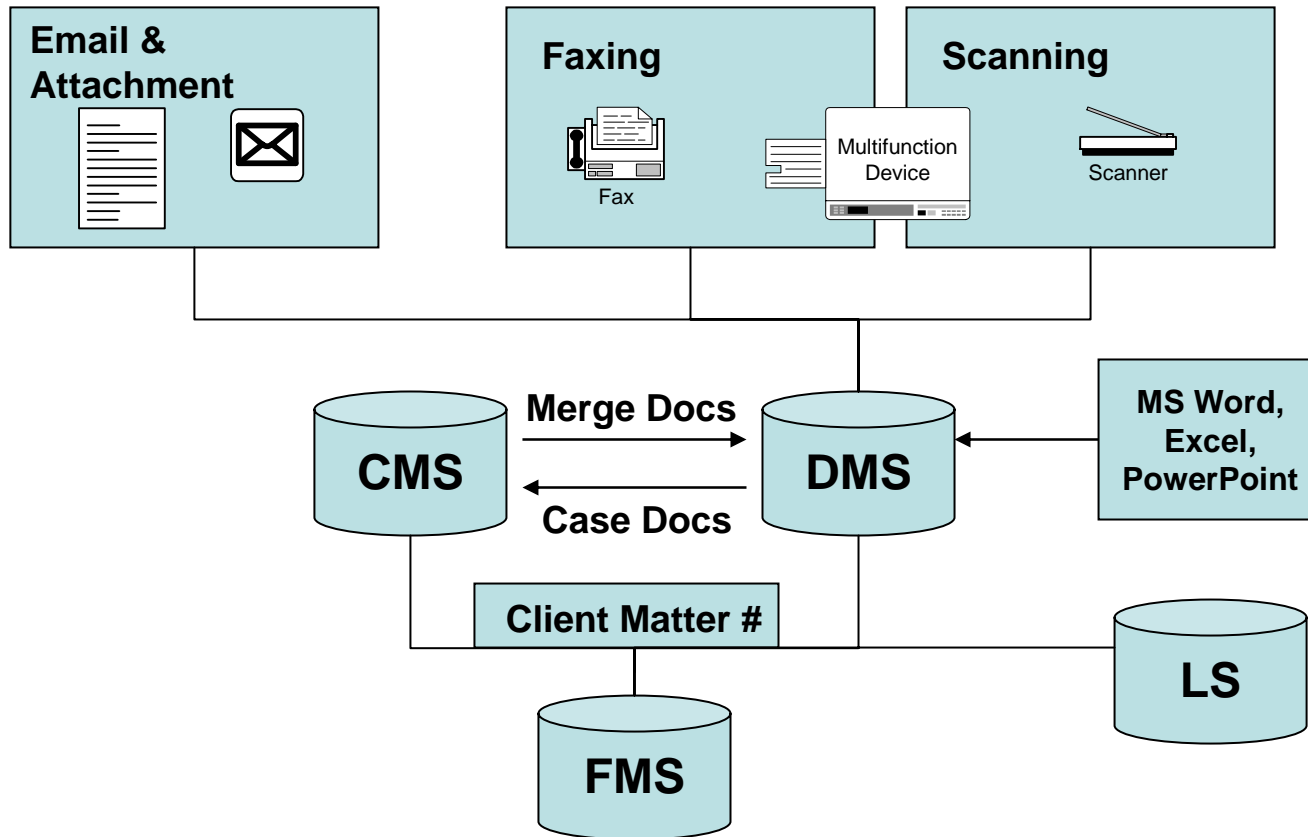
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# Fully Integrated System

- ❖ Back Office (Financial Management)
- ❖ Front Office (Case/Matter Management)
- ❖ Document Management?
- ❖ Litigation Management?
- ❖ Email?
- ❖ Remote Access?
- ❖ PDAs?
- ❖ Scanning & Imaging?

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# What is Available?

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# CMS – Small Firms

- ❖ AbacusLaw
- ❖ Amicus Attorney
- ❖ caseManager Pro
- ❖ PracticeMaster
- ❖ TimeMatters

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# CMS – Mid Size Firms

- ❖ caseManager Pro
- ❖ Client Profiles
- ❖ Legal Files
- ❖ Legal Edge
- ❖ LawBase
- ❖ PerfectLaw
- ❖ Perfect Practice
- ❖ PracticeMaster
- ❖ Practice Manager
- ❖ ProLaw
- ❖ TimeMatters
- ❖ TrialWorks

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# CMS – Large Firms

- ❖ Practice Manager
- ❖ LawBase
- ❖ Legal Files
- ❖ LegalEdge
- ❖ Mitratech

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# CMS – Corporate

- ❖ Corprasoft
- ❖ Bridgeway
- ❖ Mitrtech
- ❖ Corporate Legal Solutions

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# What Makes Systems Different?

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# CMS Functions, User Interface

- ❖ How the firm will use the software's CMS functions and the interface presented to the firm's users. Not everyone in the firm will use all functions. Some will use the Rolodex and Calendar, others may take advantage of the Case Diary or the Document Generator.

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# Customization/Configuration

- ❖ How flexible the software is in customizing the user interface screens, the document merge, calendaring, and reporting. The firm will want to configure the data input screens, calendar/tickler, document generator, and reports for each of the major practice areas.

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# Integration

- ❖ How the software interacts and integrates with other software systems and the computing environment of the firm. The system *must* integrate with the firm's T&B System. It should also integrate with a document management system (or have one built in). In addition, the system *must* integrate with Microsoft Outlook.

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# How Do You Select the Right CMS?

- ❖ Know Your Environment & Your Users
- ❖ Shopping Tips
  - Request for Proposal (Formal)
  - RFP (Quick & Easy)
- ❖ Demos
- ❖ Reference Checks

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# Thank You

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❖ [www.microlaw.com](http://www.microlaw.com)

❖ [www.law.ufl.edu/lti](http://www.law.ufl.edu/lti)

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