

ABA TECHSHOW 2007

Practice Management Software: Beyond Contacts and Calendaring

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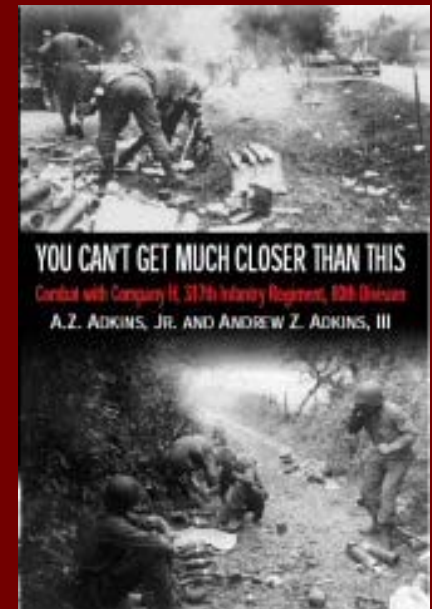
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Agenda

- Introductions
- Definitions
- Practice Management Systems
- Costs of PrMS
- Q & A

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 - Director, Legal Technology Institute (1997)
 - Associate Director, Technology Services (2003)
- Legal Tech Consultant – 1989
 - Over 350 Law Firms, Law Departments, Judiciary, Law Schools, Legal Verticals
- Author
 - *You Can't Get Much Closer Than This*
 - *Computerized Case Management Systems*
 - *WordPerfect Law Office Solutions*
 - *The KM Study, The ASP Study, The Internet Study*
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Defining Practice Management

- Is it financial management, case management, matter management, or practice management? How do you define this?

Case Management and/or Matter Management

- + Financial Management
- + Document Management
- + Business Attitude
- = Practice Management

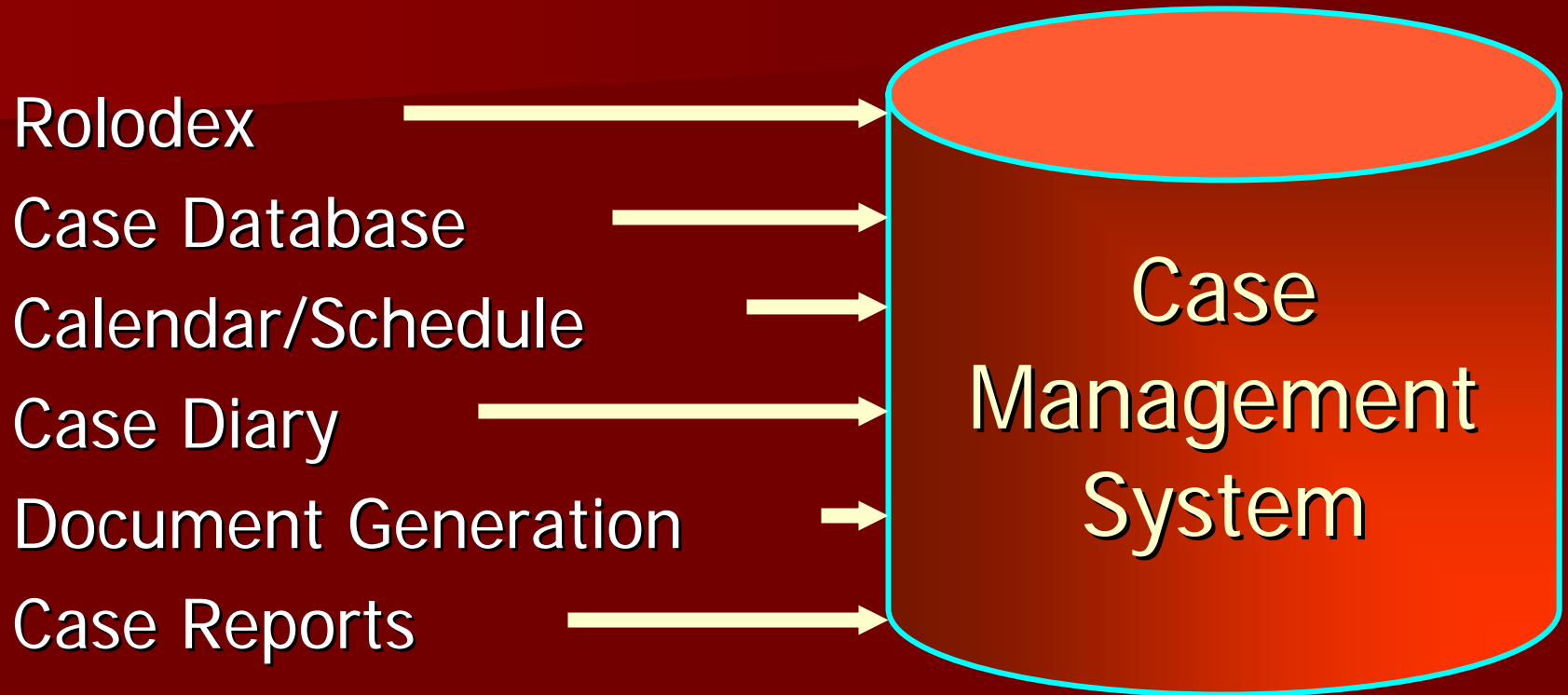


You Already PrMS

- Rolodex/Contact Database
- Case File Management
- Calendaring/Scheduling
- Case Diary/Case Notes
- Generate Documents
- Case Reports/Firm Reports
- Time, Billing & Accounting

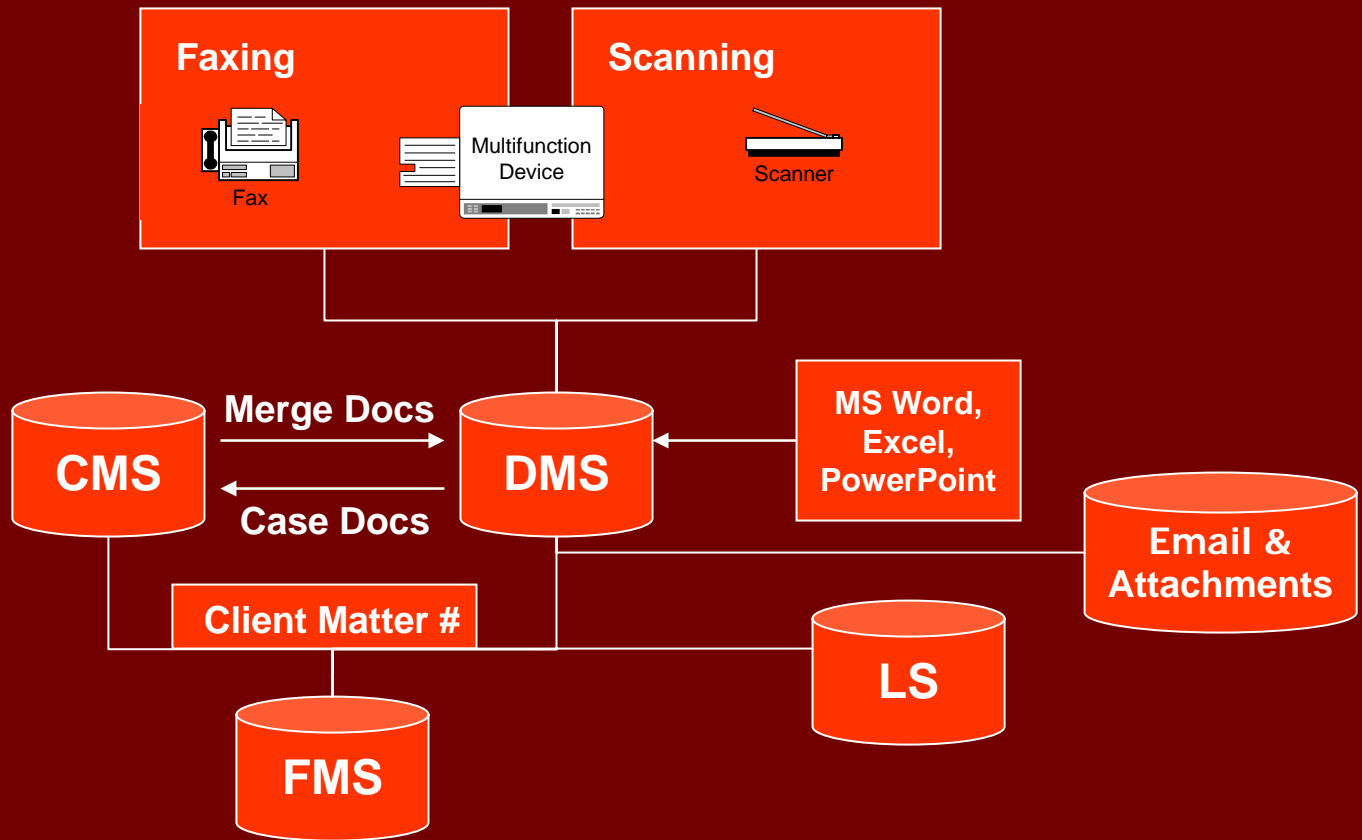


Case Management Functions

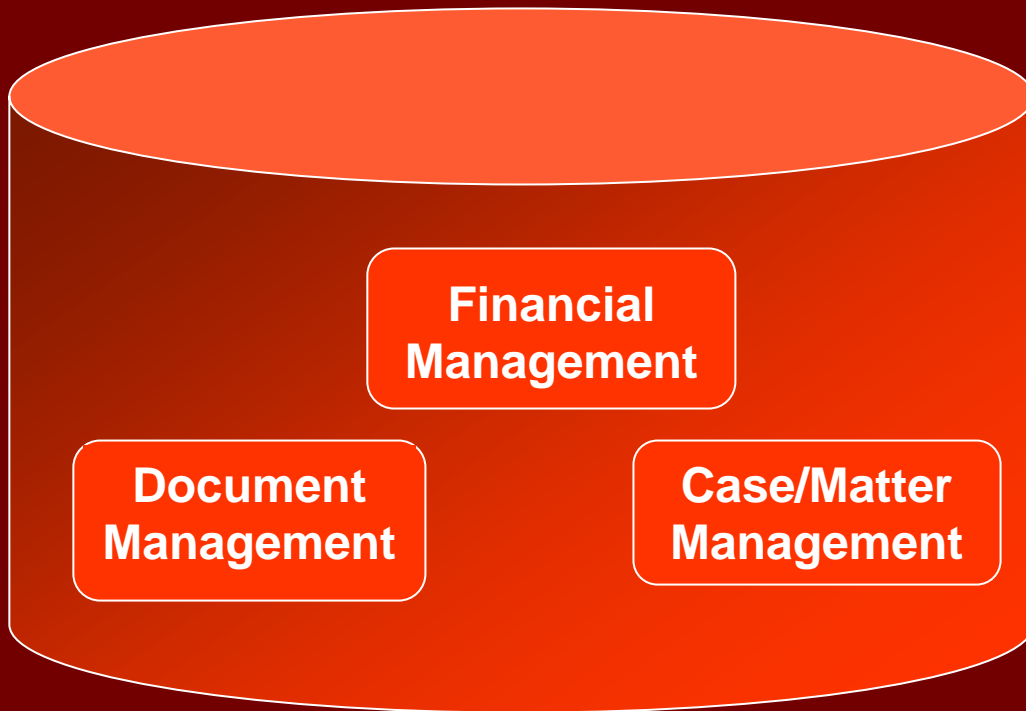


All CMSES Have These Functions!

Practice Management System



All-in-One PrMS



Benefits:

- One Developer
- Conflict Searching – once
- One-time Entry
- User learns one system

Disadvantages:

- Not necessarily best of breed
- Cost?

Non-Integrated PrMS



Benefits:

- Best of Breed
- Choices
- Cost?

Disadvantages:

- Multiple Developers
- Multiple User Interfaces
- Multiple Data Entry?
- Multiple Conflict Searches
- Cost?

AZA's CMS "Disclaimer"

- The following general CMS software applications are "market leaders"
- There are dozens of more practice specific case management systems, including:
 - Personal Injury
 - Immigration Law
 - Intellectual Property
 - Bankruptcy
 - Real Property



Small Firm Case Management

- AbacusLaw
- Amicus Attorney
- caseManager Pro
- Client Profiles
- PracticeMaster
- PerfectLaw
- ProLaw
- TimeMatters

Mid-Size Firm Case Management

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

Large Firm Case Management

- LawBase
- Legal Files
- Practice Manager
- ProLaw

“Full” Practice Management Systems (FMS, CMS, DMS)

- Client Profiles
- PerfectLaw
- ProLaw
- TimeMatters / Billing Matters

Practice Management Systems (FMS, CMS, not DMS)

- AbacusLaw (Silver, Gold Edition)
- Client Profiles
- PerfectLaw
- ProLaw
- TimeMatters / Billing Matters
- Practice Master / TABS3
- Perfect Practice

Note: There are other "combinations" of different software packages that work well together

Document Management Systems

- OpenText (Hummingbird)
 - (DOCS Open, DM5)
- Interwoven
 - (iManage, WorkSite)
- World Software Corp
 - Worldox

What Makes PrMS Different?

- User Functions, PrMS 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.
- Customization/Configuration
 - How flexible the software is in customizing the user interface screens, the document merge, calendaring, and reporting.
- Integration
 - How the software interacts and integrates with other software systems and the computing environment of the firm. The system *must* integrate with Microsoft Outlook and the firm's T&B System. It should also integrate with a document management system (or have one built in).

The Cost of Practice Management

- Range of \$1,750 - \$6,500 per user (without any hardware/network upgrades)
 - 25% - 45% for Software
 - 55% - 75% for “Soft Dollars”
 - Installation, Integration
 - Customization
 - Training
 - Annual Support
 - Non-billable lawyer and staff time involved in implementation



Return on Investment

- If the software saves you 15 minutes per day
 - Bill 15 minutes more per day
 - @ \$300/hour
 - \$75/day - \$375/week - \$1500/month
 - Don't forget to add impact from billable staffers too

\$18,000 per lawyer per year



How to Get Attorneys & Staff to Use Practice Management SW

- Food and alcohol
- “Pain” points
- Training incentives

- Shock therapy?
- Your suggestions?

PrMS “Realities”

- CMS *can* make the firm more efficient
- CMS *will* change the way the firm practices law
- Firm *must* commit to the CMS rollout
- Training, Training, Training

Q & A

- What is the “best” PrMS system?
- Who’s the “best” lawyer in your state?
- Do I know an *independent* legal technology consultant who is familiar with practice management systems?
- Will the Gators win the National Championship (again)?



Thank You!

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