



**WSSFC 2022**

**Technology Track – Session 6**

# **Practice Management Software: Newest Features & Offerings**

*Jeffrey S. Krause, Christopher C. Shattuck*

## About the Presenters...

**Jeffrey S. Krause** is a Wisconsin attorney and a partner with Affinity Consulting Group where he is a member of the document management, management consulting and practice management advisory teams. He has spent more than twenty years assisting legal organizations of all types and sizes choose the right technology and use it the right way. Jeff writes and speaks on a variety of topics related to legal technology and efficiency. He is a long-time planning committee member and a past chair of both the Wisconsin Solo and Small Firm Conference as well as the Milwaukee Bar Association Law and Technology Conference.

**Christopher C. Shattuck** has been the Law Practice Assistance Manager for the State Bar of Wisconsin since 2017. Mr. Shattuck previously managed a department and litigated cases at a creditors' rights firm in Milwaukee. In addition to providing confidential law practice consultations, he frequently writes and speaks on law practice management topics. He received his undergraduate and master of business administration degrees from the University of Wisconsin — Oshkosh and his law degree from the University of La Verne College of Law in southern California.

# **Practice Management Software: Newest Features & Offerings**

*Wisconsin Solo and Small Firm  
Conference 2022*

By: Jeff Krause & Christopher C. Shattuck

## Outline


1. Types of Practice Management Software
  - A. [Cloud-based](#) – State Bar members receive discounts on [MyCase](#), [Clio](#), [PracticePanther](#), and [Zola Suite](#). Low monthly subscription fees based upon number of users.
  - B. Desktop-based – [Tabs3](#) (State Bar members receive discount) offers the same features of cloud-based software, but instead of the data being stored in the cloud, it is stored on your desktop.
2. Calendars and Scheduling
  - A. [Firmwide Calendars](#) – Easily view firmwide, workgroup or individual calendars. Filter by types of events, matter and other criteria.
  - B. [Calendar Sync](#) – Get the best of both by synchronizing the powerful firmwide calendar with your individual Outlook calendar.
  - C. [Appointment Booking](#) – Provide your potential or current clients with the option to schedule an appointment directly with you, without having to exchange emails or phone calls to settle on a time to meet.
  - D. [Rules-Based Scheduling](#) – Integrate with [LawToolBox](#) to eliminate the hassle of calculating dates and schedules.
3. Working with Documents
  - A. [Word Integration](#) - Open or save a document, create a time entry or save your document as a template with modern Microsoft 365 based add-ins available on all your devices.
  - B. [Link to Online Storage](#) - Store your documents online in OneDrive or SharePoint and work with them anytime and from anywhere.
4. Communication
  - A. [Email Management](#) - Tag emails to a Matter in Outlook. See the complete list of case communications in your practice management application.
  - B. [Text Messaging](#) – More and more clients want to text with their lawyers. With this feature, you can text without giving out your personal cellphone number and ensure the messages are being stored in the case management system.
  - C. [Client Portal](#) – Secure client portals for you to exchange invoices, documents, or communications with your clients.
5. Automation
  - A. [Document Automation](#) – Place your document templates into the software to generate pleadings, engagement letters, standard orders, and other documents.
  - B. [Task & Workflow Management](#) – Track and create workflows to automate deadlines in your cases.
6. Integrations
  - A. [App Integrations](#) – Integrate other applications into your case management system to obtain maximum efficiency from streamlined processes.

Practice Management Software: Newest Features and Offerings  
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- B. [Document Management Integration](#) – See, access and manage documents in your document management system from your practice management system.
  - C. [Legal Research Integration](#) – Integrate your legal research platform into your practice management system to easily save and bill your clients for research.
  - D. [E-signatures](#) – Utilize integrations or choose a practice management system that has a built-in e-signature option to have your clients quickly sign and return documents.
7. Time, Billing and Accounting
- A. [Capture Time](#) - Powerful add-ins allow you to capture and record time from the applications you are working in every day.
  - B. [Automatic Lawyer Time-Tracking Software](#) – Tracks time and automatically creates billable entries for time spent in the case management software, Word, and Outlook.
  - C. [Generating Bills](#) – Automate the practice of generating and sending client bills after confirming your billable time.
  - D. [Accepting Payments](#) – Collect payments from your clients via credit cards, ACH transfers, or other online services.
  - E. [Accounting](#) – No need for an integration with QuickBooks Online. Complete the accounting you need to run your firm in the same application you use to bill your clients.
  - F. [Trust Accounting](#) – Automate your trust account features by using built-in trust account features that link to your billing and client payment information.
8. Grow and Manage Your Firm
- A. [Legal Marketing Tools](#) – Track referral sources and determine your ROI from marketing services.
  - B. [Conflict Checking](#) – Search your database of case files, contacts, matters, and other searchable terms for conflicts.
  - C. [Firm Dashboards](#) - View the information most important to you in easy-to-read graphical reports on your customizable firm dashboard.
  - D. [Firm Metrics](#) - Run and view reports of critical profit-driving metrics within your firm.
9. Contact Information

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Practice Management  
Software: Newest Features &  
Offerings

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Christopher C. Shattuck

# Presenters



**Jeff Krause**  
Legal Technology Consultant



**Christopher C. Shattuck**  
Law Practice Assistance Manager



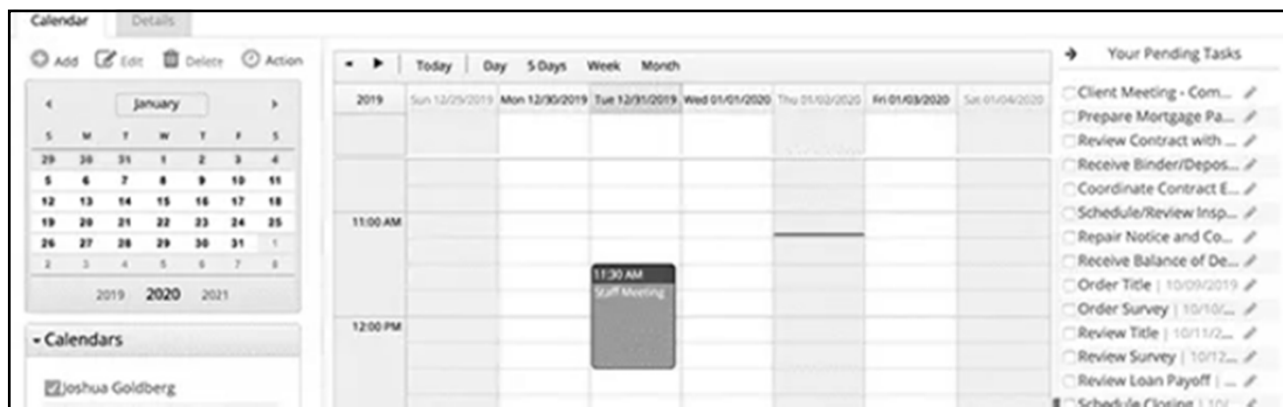
## Types of Practice Management Software

- Cloud-based – State Bar members receive discounts on MyCase, Clio, and PracticePanther. Low monthly subscription fees based upon number of users.
- Desktop-based – Tabs3 (State Bar members receive discount) offers the same features of cloud-based software, but instead of the data being stored in the cloud, it is stored on your desktop.

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## Calendars and Scheduling

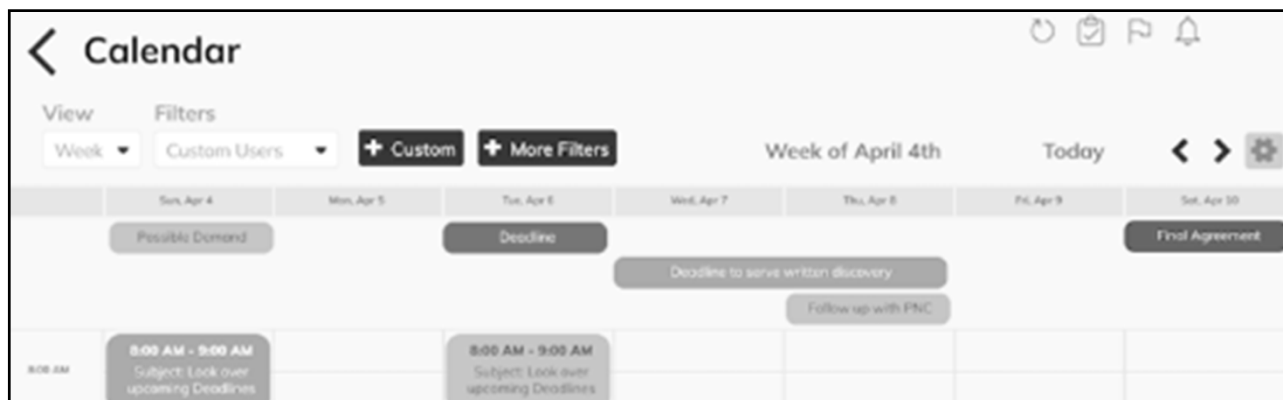




## Firmwide Calendars

Easily view firmwide, workgroup or individual calendars. Filter by types of events, matter and other criteria. CosmoLex calendar shown above.

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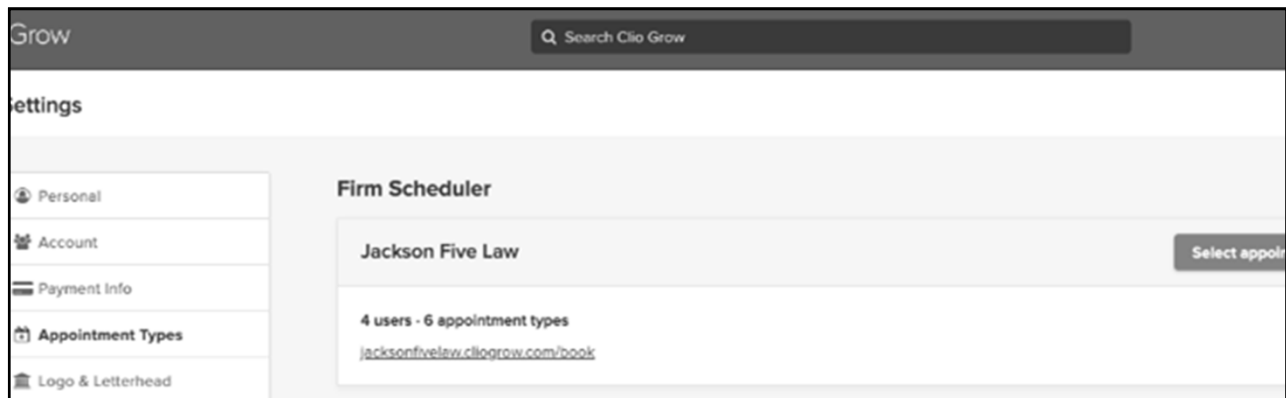


## Calendar Sync

Get the best of both by synchronizing the powerful firmwide calendar with your individual Outlook calendar.

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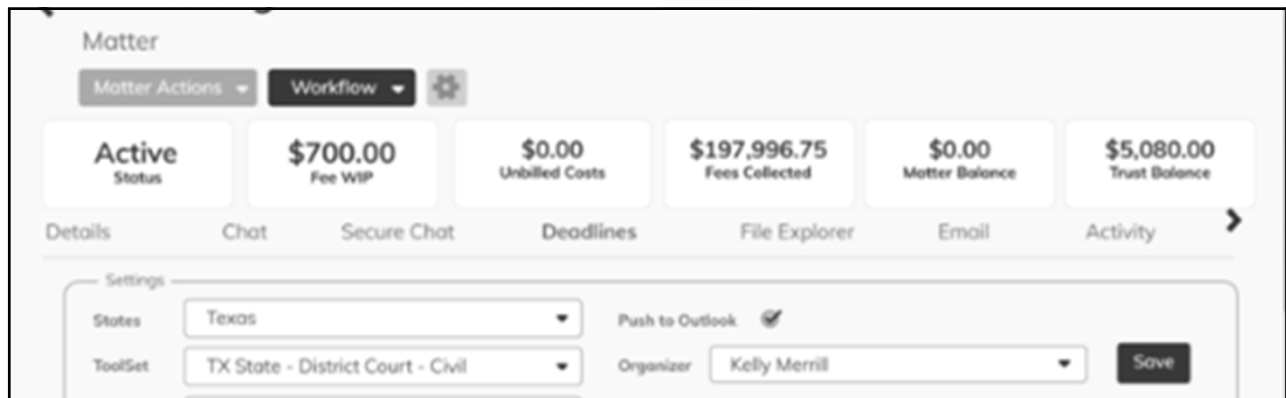




## Appointment Booking

Provide your potential or current clients with the option to schedule an appointment directly with you, without having to exchange emails or phone calls to settle on a time to meet.

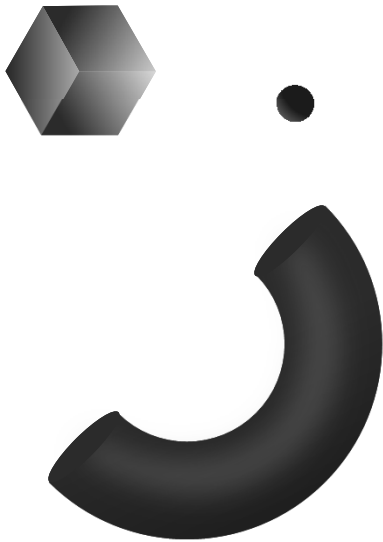
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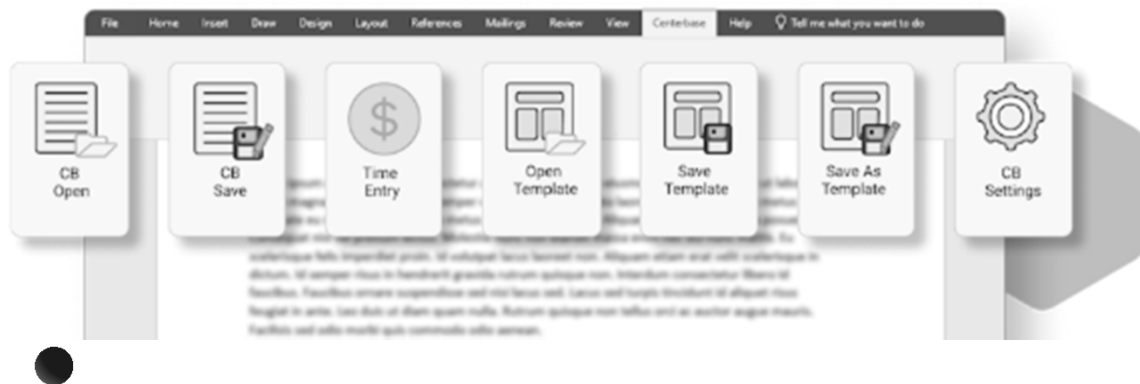
## Rules-Based Scheduling

Integrate with LawToolBox to eliminate the hassle of calculating dates and schedules.

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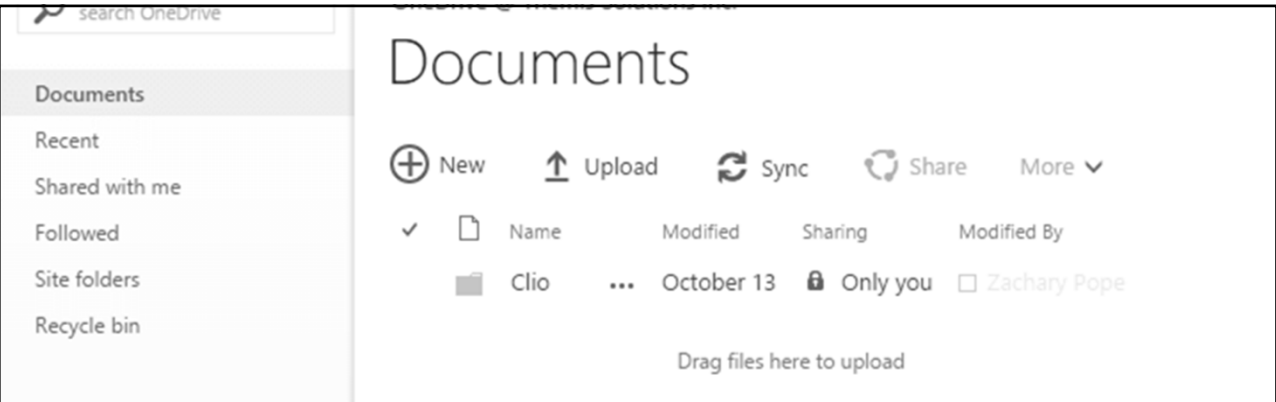


# Working with Documents



## Word Integration

Open or save a document, create a time entry or save your document as a template with modern Microsoft 365 based add-ins available on all your devices. Centerbase Word add-in shown above.



**Link to Online Storage**

Store your documents online in OneDrive or SharePoint and work with them anytime and from anywhere. Changes are reflected in your practice management system. Clio OneDrive integration shown above.

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# Communications

Matter Actions

Workflow

Details

Chat

Deadlines

File Explorer

Documents

Billing Entries

Email

Calls

Link

Enter your search

Search

Clear

Download All

	Subject	Matter	Creation	Last Modified	Creator	To
	RE: - New Investor	Abbe Goudman	09/11/2020 5:56 AM	09/11/2020 5:56 AM	Cole Martin	Cole Martin [IO=Exch...
	RE: - New Investor	Abbe Goudman	07/31/2020 6:45 AM	07/31/2020 11:45 AM	Cole Martin	Cole Martin [IO=Exch...

●

## Email Management

Tag emails to a Matter in Outlook. See the complete list of case communications in your practice management application. Centerbase Case Email panel shown above.

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Send and receive text messages in Clio.

Securely send texts and event notifications through Clio. Provide clients with quick updates and answers to their urgent questions—without using your personal phone number.

Get assigned a toll-free phone number

Reduce no-shows with event text notifications


Automatically log your message threads

●

## Text Messaging


More and more clients want to text with their lawyers. With this feature, you can text without giving out your personal cellphone number and ensure the messages are being stored in the case management system.

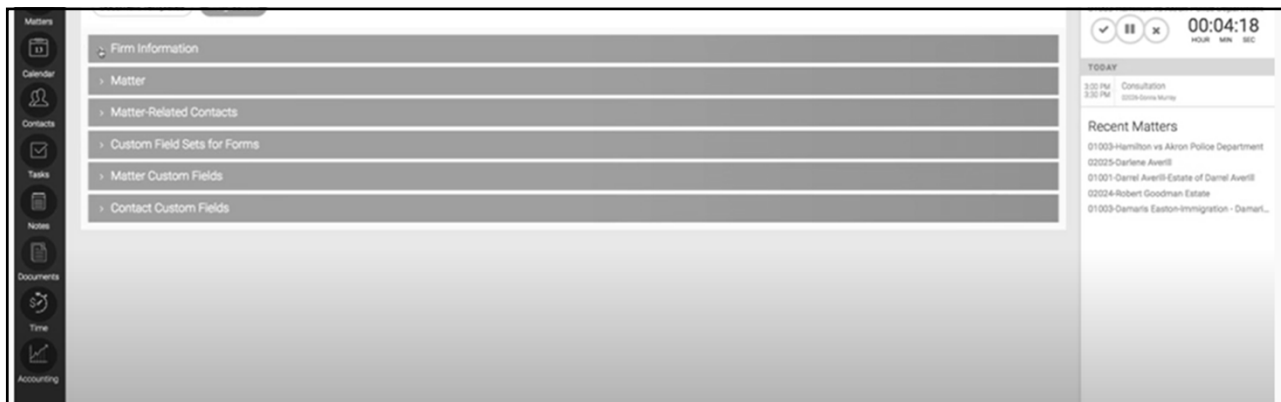
14

zolaCaseway™ Portals		Standard Portal	Signature™ Portal
Ability to share documents with collaborators		✓	✓
Ability to share invoices with clients		✓	✓
256-bit, bank-level encryption		✓	✓
Cost		Included	One-time fee
 <h2><u>Client Portal</u></h2>		<p>Secure client portals for you to exchange invoices, documents, or communications with your clients.</p>	

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# Automation

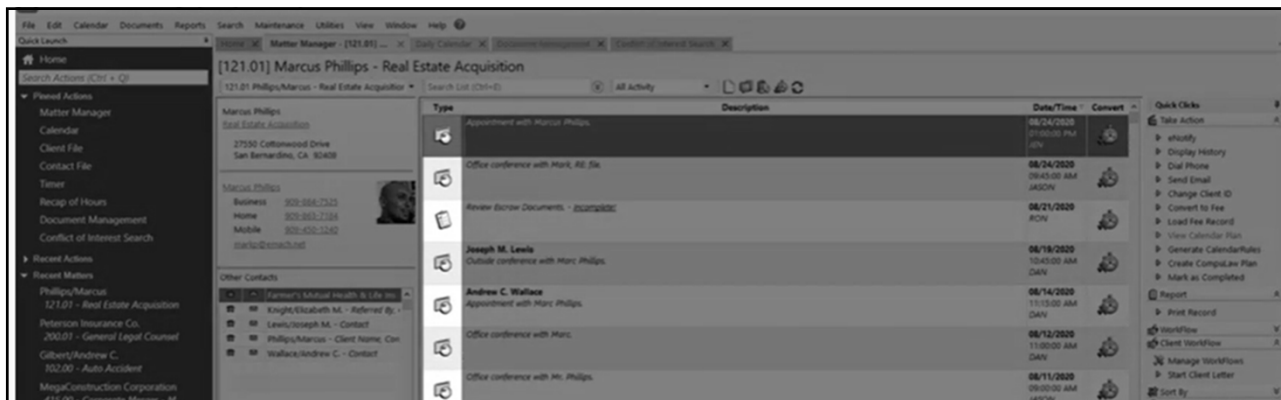




## Document Automation

Place your document templates into the software to generate pleadings, engagement letters, standard orders, and other documents.

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## Task & Workflow Management

Track and create workflows to automate deadlines in your cases.

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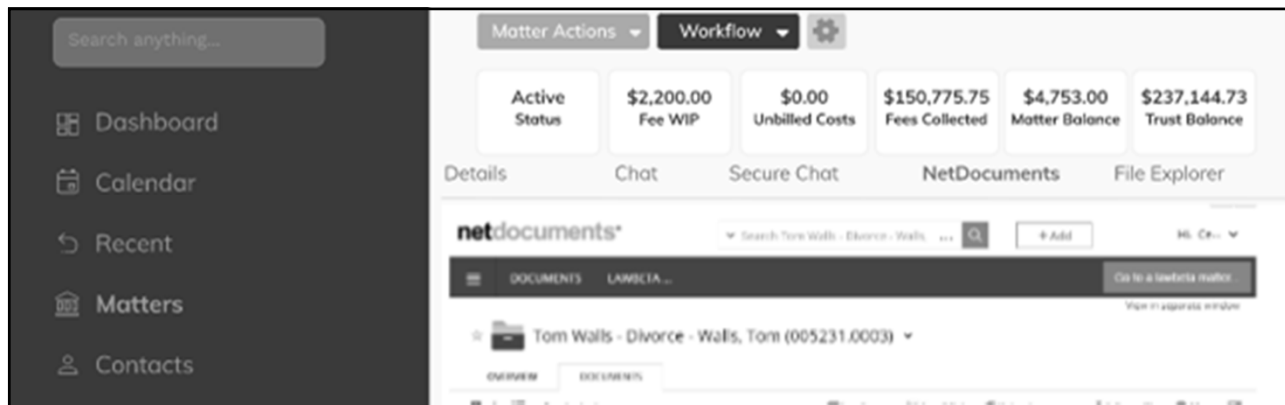


# Integrations



## App Integrations

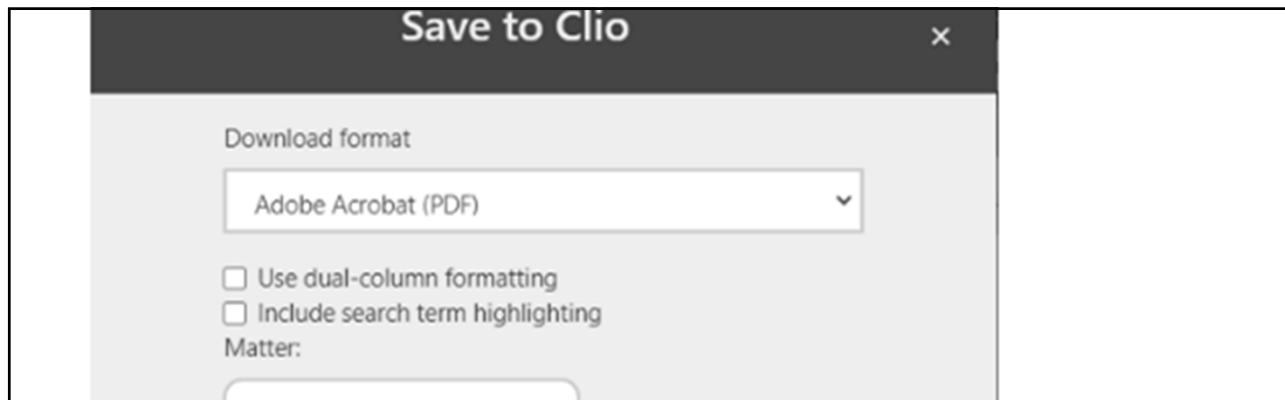
Integrate other applications into your case management system to obtain maximum efficiency from streamlined processes.



## Document Management Integration

See, access and manage documents in your document management system from your practice management system. No need to switch back and forth. Automatically create clients, open matters and close matters in your document management system based on changes to the matter. Centerbase integration shown above.

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## Legal Research Integration

Integrate your legal research platform into your case management system to easily save and bill your clients for research.

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## Overview

Collect e-signatures from your clients when sharing any PDF documents in Clio Manage using the HelloSign integration.



## E-signatures

Utilize integrations or choose a practice management system that has a built-in e-signature option to have your clients quickly sign and return documents.

See Shortcuts

Fit Width

### Fields

 Signature

 HS Initials

 Date Signed

 Textbox

 Checkbox

 Dropdown

### FINANCIAL STATEMENT In the Provincial Court of British Columbia

In the case between:

vs.

And:

vs.

#### AFFIDAVIT

I,

do hereby declare under oath that the information in this financial statement is true, to the best of my knowledge.

1. The information in this financial statement is true, to the best of my knowledge.

2. I have made complete disclosure in this financial statement of (check applicable boxes)

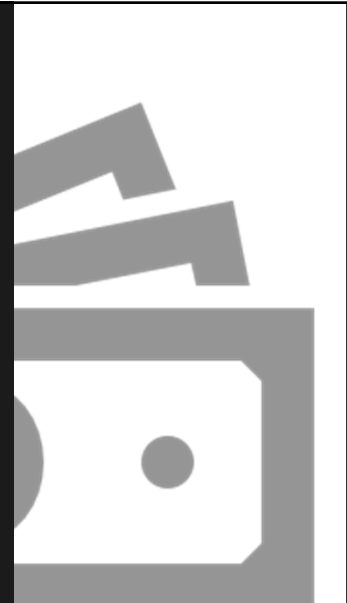
☐ my income, including benefits and adjustments, if any, in Part 1

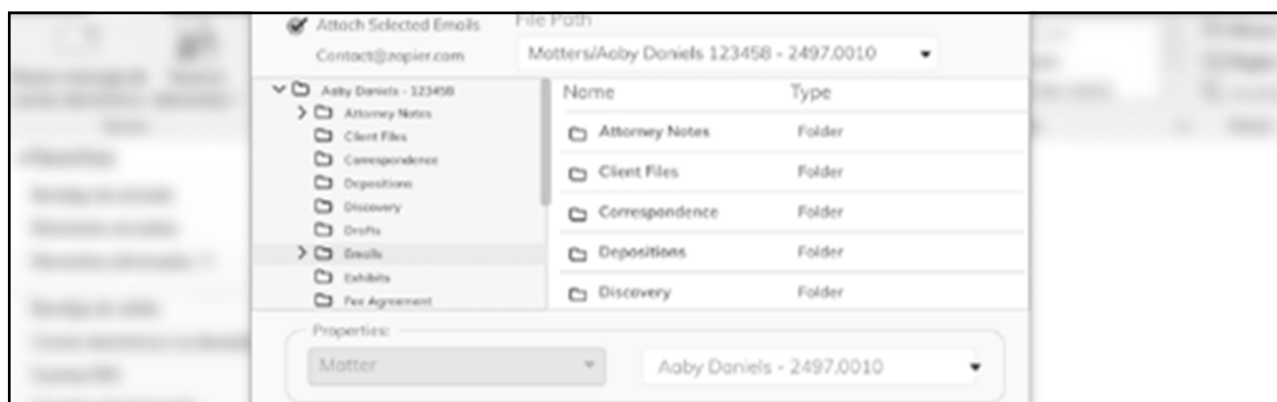
☐ my expenses, in Part 2

☐ my assets and debts, in Part 3

3. I do not anticipate any significant changes in the information set out in this financial statement.

## Time, Billing and Accounting





## Capture Time

Powerful add-ins allow you to capture and record time from the applications you are working in every day. Enter time for that email you just sent or for the document you are working on. Centerbase Outlook add-in shown above.

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Intelligence

Time spent in Word, and Outlook

Billable minute

Added to bills

Provided to clients

BOOK A DEMO

AutoTime

- ✓ Automatically compile billing entries
- ✓ No manual entry
- ✓ Adjust times before finalizing bills
- ✓ Seamless integration with Smokeball Billing

BOOK A DEMO

Profitability


- ✓ Profit per matter
- ✓ Profit per matter
- ✓ Work done by
- ✓ Track KPIs v


BOOK A DEMO

## Automatic Lawyer Time-Tracking Software

Tracks time and automatically creates billable entries for time spent in the case management software, Word, and Outlook.

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Change
Remove

Note: Your changes are not saved yet! Click "Save" at the bottom of the page.

COMPANY NAME
Marcos S

WEBSITE
Add website...

ACCOUNT OWNER
Marcos S

## Generating Bills

Automate the practice of generating and sending client bills after confirming your billable time.

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Invoice Number: #8302117
Invoice Amount: \$500.00

Matter: Chad's May 2016 Case
Amount Paid: \$0.00

Outstanding Amount: \$500.00

Online Payment
Offline Payment
From Trust Account
From Credit Account

Payment Method
Date
05/20/2016

Notes
Amount

Deposit Into
Operating Account

☐ Pay in full

## Accepting Payments

Collect payments from your clients via credit cards, ACH transfers, or other online services.

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Justice Law Firm, LLC  
**Profit and Loss**  
 (Cash Basis)  
 01/01/2017 - 12/31/2017

Income	<u>Total</u>
4100:Fee Income .....	\$33,034.77
4102:Fee Income-Real Estate Income .....	\$150.00
4125:Discounts .....	(\$1,212.50)
4150:Other Business Income .....	\$661.42
4200:Reimbursed Client Costs (Direct) .....	\$670.46
4250:Inhouse Reimbursed Costs (Indirect) .....	\$1,260.00
<b>Total Income</b>	<b>\$34,444.15</b>

## Accounting

No need for an integration with QuickBooks Online. Complete the accounting you need to run your firm in the same application you use to bill your clients.

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BANK ACCOUNT NAME Trust Account  
 BANK ACCOUNT NUMBER 0000  
 DATE 03/26/2017

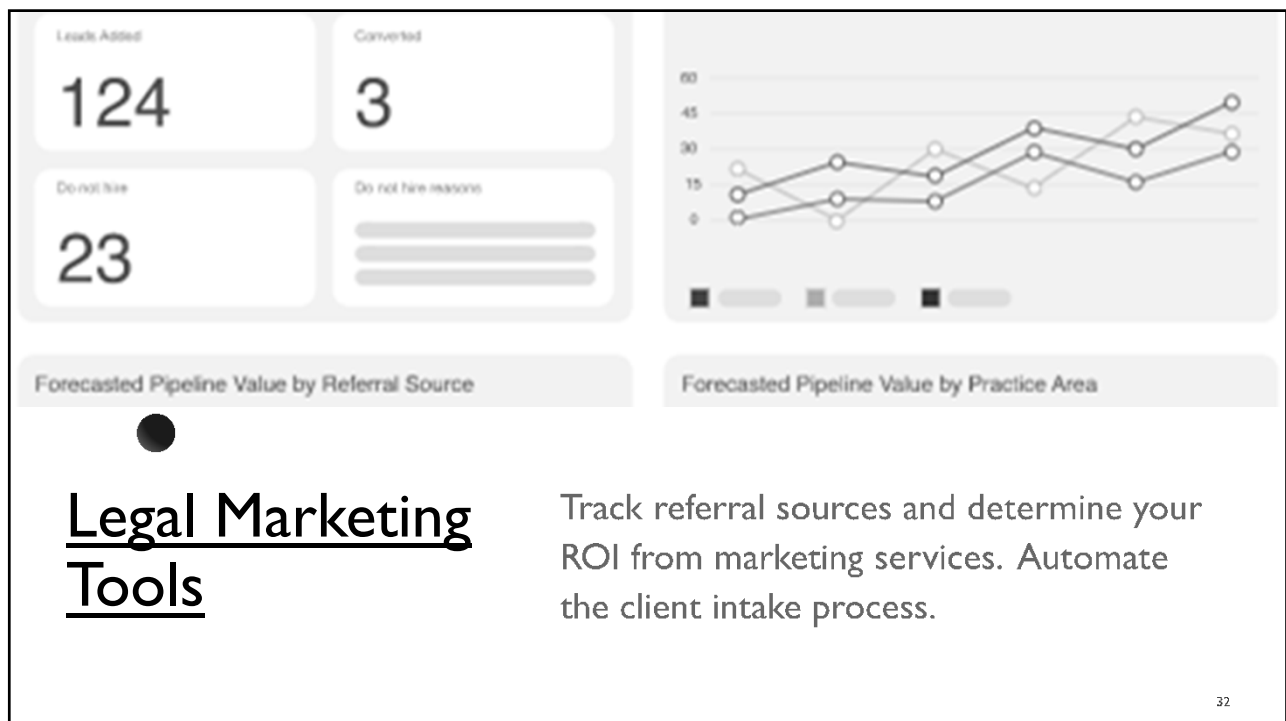
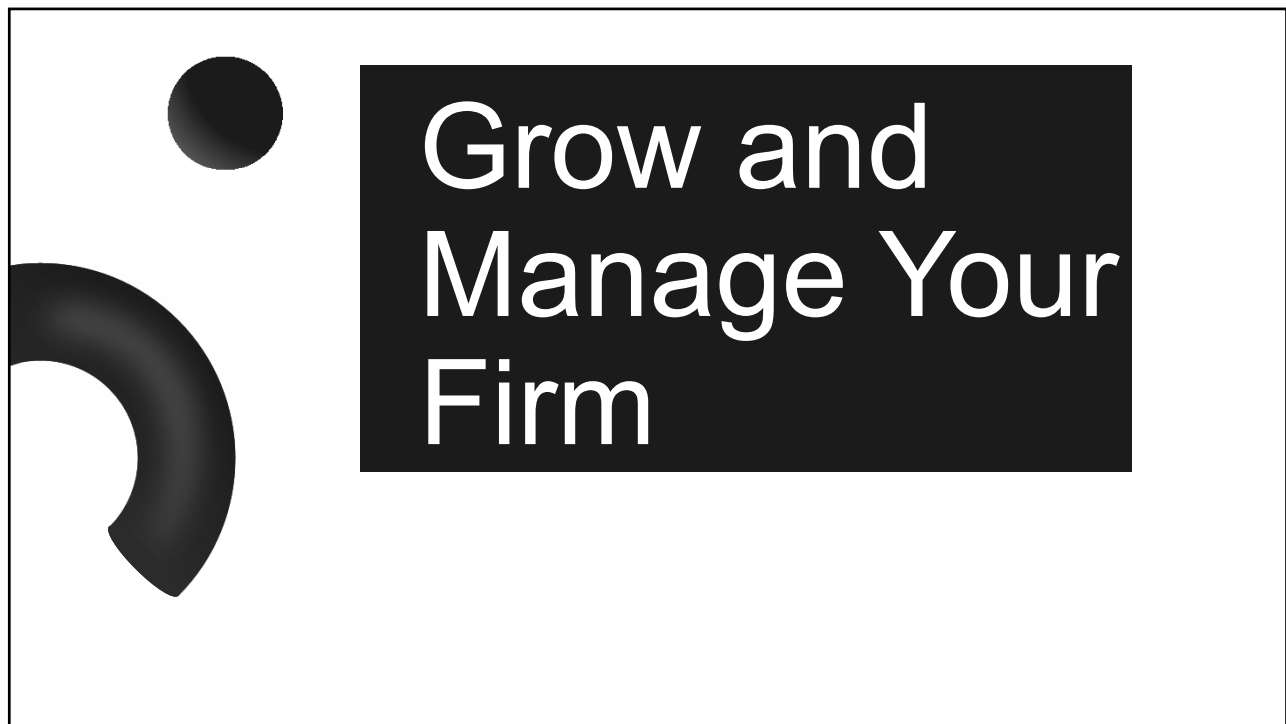
### Client Ledger Balances

CLIENT NAME	MATTER NUMBER	RESPONSIBLE ATTORNEY	PRACTICE AREA	LAST DEPOSIT DATE	BALANCE AS OF 03/26/2017
ABC Corp.	01011-General Business Advice	Robert E. Dupon...	Corporate	10/10/2016	\$4,000.00
Averill Daniel	01008-Daniel Averill-smith v. Jones...	Robert E. Dupon...	Business Development...	10/26/2016	\$1,500.00

## Trust Accounting

Automate your trust account features by using built-in trust account features that link to your billing and client payment information.

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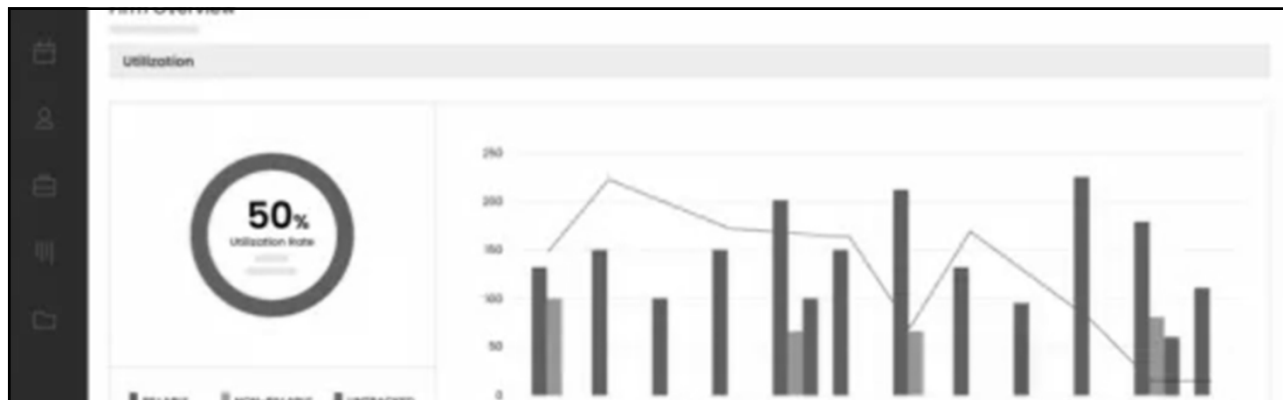


<ul style="list-style-type: none"> <li>Tasks</li> <li>Matters</li> <li>Contacts</li> <li>Activities</li> <li>Bills</li> <li>Accounts</li> <li>Documents</li> <li>Communications</li> <li>Reports</li> <li>Campaigns</li> <li>Integrations</li> <li>Settings</li> <li>Help</li> </ul>	<ul style="list-style-type: none"> <li>Matters</li> <li>Contacts</li> <li>Calendar Entries</li> <li>Notes</li> <li>Tasks</li> <li>Activities</li> <li>Documents</li> <li>Communication Logs</li> </ul>	<table> <thead> <tr> <th>Matter / Description</th><th>Associated client</th><th>Location / Match</th></tr> </thead> <tbody> <tr> <td>Boyd-00203 Bankruptcy</td><td>Andrea Boyd</td><td>Co-counsel Linda Rogers</td></tr> <tr> <td>00396-Rogers Adoption</td><td>Buck Rogers</td><td>Display Number 00396-Rogers</td></tr> <tr> <td>Rogers-00312 Murder</td><td>Buck Rogers</td><td>Display Number Rogers -00312</td></tr> <tr> <td>Rogers-00197 Adoption</td><td>Perry Rogers</td><td>Display Number Rogers -00197</td></tr> <tr> <td>Rogers-00196 Wrongful Dismissal</td><td>Perry Rogers</td><td>Display Number Rogers -00196</td></tr> </tbody> </table>	Matter / Description	Associated client	Location / Match	Boyd-00203 Bankruptcy	Andrea Boyd	Co-counsel Linda Rogers	00396-Rogers Adoption	Buck Rogers	Display Number 00396-Rogers	Rogers-00312 Murder	Buck Rogers	Display Number Rogers -00312	Rogers-00197 Adoption	Perry Rogers	Display Number Rogers -00197	Rogers-00196 Wrongful Dismissal	Perry Rogers	Display Number Rogers -00196
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Rogers-00196 Wrongful Dismissal	Perry Rogers	Display Number Rogers -00196																		

## Conflict Checking

Search your database of case files, contacts, matters, and other searchable terms for conflicts.

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## Firm Dashboards

View the information most important to you in easy-to-read graphical reports on your customizable firm dashboard. Add reports based on time, productivity, billing or accounting. Clio Firm Insights Dashboard shown above.

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# Thank You

Jeff Krause

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