



# **Building a Successful Law Firm: A Toolkit for Solo and Small Firm Lawyers**

## **Case Management Software, On the Go: Web-based Solutions**

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# CASE MANAGEMENT SOFTWARE ON THE GO WEB-BASED SOLUTIONS

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October 25, 2016

## **Overview**

Client case management is evolving. Thirty years ago firms stored files in large cabinets and kept client notes and case materials in large folders, binders, and other collection of paper. Firms would memorialize conversations, answering machine messages, and other communications with notes and perhaps recordings—but storage of any recordings could be cumbersome. Files would take up a lot of space. Some firms still have this method of record keeping.

## **Server-Based Systems**

Law firms progressed in the computer age to having large in-house servers hosting client files, email inboxes, and other key information for their practice. Case management systems implemented on the server-side, like PracticeMaster, have the benefit of in-house security, but the downside of a degree of inaccessibility for both lawyer and client. These systems also tend to feature outdated, awkward user interfaces, requiring several clicks to reach important information. Still, systems like PracticeMaster, paired with server-based document management systems like WorldDox, are popular even today in some law firms.

## **Cloud Based Systems**

Then there is the “cloud.” The “cloud” is a technology term for a means of interfacing with software, documents, and other computer data deployed and stored on a third party server. The cloud is designed to be accessible from any device anywhere and at any time. For lawyers, this means you can be in a hotel far away, in court, or on site with a client and still have complete access to client files, emails, and the rest of your firm’s vital data.

## **Benefits of Cloud Based Practice Management Systems**

1. **Ease of access.** Cloud based practice management systems can be accessed from anywhere with a multitude of devices.
2. **User friendly.** Cloud based practice management systems tend to feature modern user interface concepts and tend to be more accessible than older, server-based systems.
3. **Client access.** Some of these systems allow for client access and are built around the idea of keeping clients informed and reducing complaints related to the responsiveness of attorneys. Some have professional client portals which also provide a professional presentation.
4. **Automated document production.** Most of these systems allow for simple automated document production. There is some work creating templates (discussed further below), but once templates are created you can save a lot of administrative time.
5. **Online billing.** Most of these systems feature online billing, allowing you to take advanced payment into trust accounts or direct payment into operating when billing for work already performed. Systems account for trust payments and credit card fees, assessing the fee against operating so that the full amount of money charged is held in trust.
6. **Tasks and workflow.** Cloud based systems usually have task and workflow systems that allow assignment delegation. Workflows are usually preset groups of tasks automatically generated from a case designation when opening a file.
7. **Security.** Security is often brought up as a potential weakness, but I view this as a strength. You do have an ethical requirement to ensure adequate security of the systems used, the method of connection used (are the wireless routers you use secure?), but once you cross that threshold, you will find that most systems have good security. This means

you have effectively outsourced a task that might be more daunting if done in house. The same holds true for third party email systems too.

8. **Easy time entry.** Most systems have timers and other simple systems for time entry. Some are better and more prominent than others.
9. **Instant backup.** While you should not rely entirely on your case management system and have some redundancy, the fact is that these systems, especially when coupled with cloud based document storage like Google Drive or Dropbox, provide instant backup across multiple synced devices and of course the cloud service itself.
10. **Conflict checking.** This can be good on some systems and more difficult on others. However, most systems allow simple data entry and a clear mapping/categorization of people's roles (client/adverse/co-aligned/etc.)
11. **Cost.** Cost for these software as a service packages are pretty reasonable, although they grow with the number of users. They tend to be cheaper than server-based solutions, and their use also potentially removes the need for an in-house IT person or independent contractor.
12. **Lots of options.** Here is a non-exhaustive listing of the cloud-based practice management solutions:
  - CLIO
  - MyCase
  - RocketMatter
  - Abacus Law
  - Practice Panther
  - Lawcus
  - Amacus Attorney/Cloud
  - HoudiniESQ

## **One Implementation – CLIO/Google/Android**

When I decided to open Connors Law in the summer of 2016, I knew I needed to be mobile to have a competitive advantage over other firms, to demonstrate to my tech-savvy clientele that they would be getting service with up-to-date technology, and ultimately to give good service to my clients. We use the following technology and cloud-based services:

- **Google business apps.** Google business apps include email accounts, word processing/office applications, and the all-important Google Drive. Gmail for business allows you to create professional email addresses tied to your business gmail account (e.g., [andrew@apconnorslaw.com](mailto:andrew@apconnorslaw.com)). Gmail itself is a cloud-based system that you can access by a website or by a conventional email program like Outlook. Google's office productivity suite is serviceable but not adequate for many legal documents, and so I'd suggest using it only if absolutely necessary, and then only perhaps to take notes or write a rough draft of a document. Google Drive is a great cloud-based document storage system, and a business account has unlimited space. A small upgrade includes auditing and other access control features. Google Calendar is top notch and syncs with most any cloud-based practice management system.
- **Microsoft Office 365.** As much as I wanted Google Docs and their productivity suite to meet my firm's needs, Google is just not quite there yet. Nothing holds a candle to the tried-and-true Word, Excel, and Outlook (Google Slides may be better than PowerPoint, I should note). Licenses for business are reasonable. Be sure to take advantage of free trial memberships. Microsoft Office 365 is also cloud based, and Microsoft is making a push cloud storage of documents produced with its software. Unfortunately, Microsoft cloud storage is not an option for most or all cloud-based practice management services.
- **Android-based Phone.** The eternal debate between iPhone and Android. Because of the significant integration with Google services and Android devices, I went with Android. I am very happy with my Samsung Galaxy s7.
- **Grasshopper phone system.** Even your phone system can go into the cloud. We use Grasshopper, which allows for call forwarding to cell phones, introductory messages, and

voicemail messages forwarded to email, which can then be saved to your practice management system.

- **RightSignature.** This online system allows for an easy way to sign contracts. My firm uses this system almost exclusively for engagement agreements.
- **CLIO**
  1. **Easy intake.** When a potential client calls in, we get all pertinent information immediately into CLIO and open a case file. When an attorney calls back or provides an initial consultation, easy note taking features in CLIO make sure all information is saved.
  2. **Easy correspondence.** When future emails are sent or received, all of them are saved easily by an Outlook Plugin provided by CLIO.
  3. **Easy time.** CLIO has an easy time keeping tracker that allows you to play, pause, and add on to accrued time. You can also run multiple timers at once, starting and stopping as you shift tasks.
  4. **Automated document creation.** CLIO has a simple list of variables that correspond to fields in the intake and other data entry process. You can also create custom fields and add them to a matter for data entry (e.g., specific courts, judge assigned, fees assessed, etc.), then use those fields in your document creation.
  5. **Client access and sharing.** Documents can be shared and commented on within CLIO. Clients can also send secure messages through CLIO. This all keeps conversations out of your inbox and managed and organized directly in your filing system.
  6. **Powerful invoicing and trust requests.** Invoices are relatively easy to create and prepare. CLIO allows you to set templates for different kinds of matter (fixed fee, hourly, litigated, etc.), and you can ask for trust money through the same invoicing system.

These are just some of the things you can do with on-the-go cloud based systems for your solo or small firm.