



Practice and Case Management

# Legal Applications

Learn how to select the best tools for your firm.



## Streamline Firm Management with Legal Applications

Most law firms realize the benefit of using Practice and Case Management software. These tools help keep a firm organized, track performance, and balance workloads. They're created especially for law firms, so—while they deal with quotidian details—they're organized by case or matter.

Smaller firms may rely on this type of software because they don't have the resources to put toward a case manager or law office administrator. Mid-size and larger firms may have managers, administrators, and other support staff who use this software as a tool for organization.

Whether a law firm is small or large, Practice and Case Management software can make a profound difference in efficiency of operation.

### What Case and Practice Management software can do for your firm

Case Management software concentrates on doing one thing well: managing cases. These applications store information about matters and cases in a searchable database. Most Case Management software allows users to check for conflicts of interest and statutes of limitations.

Practice Management software can help a law firm with case management, as well as other day-to-day tasks, such as calendaring and contact management—even document assembly.

Some law firms cobble together their practice management technology by using a variety of specialized applications, such as Quickbooks for billing and Outlook for contact management. This can work up to a point, but one benefit of using Case or Practice Management software is that everything is in one place. And, many Practice Management software options integrate with other applications (such as Outlook) for ease of use.

The key is determining what needs your law firm has and finding the right software to address those needs.



## Popular Practice and Case Management software

Here are some popular applications that will help law firms manage their practices and cases:

1. **PracticeMaster:** This option is made by Tabs3, so it integrates with their billing software. It also provides calendaring, conflicts and contact management, and document assembly, as well as research, email, and phone call tracking. Other programs with which it integrates include Quickbooks, CalendarRules, Worldox, and Outlook. PracticeMaster works well for small to medium law firms.
2. **Needles:** A good solution for law firms of all sizes, Needles features calendaring, document scanning and assembly, client contact information, case and matter management, and time and billing.
3. **Time Matters:** LexisNexis is the parent company of Time Matters, which works best for medium-sized law firms. It provides calendaring; task, client, and project/matter management; and calendaring. It integrates with Office suite as well as other LexisNexis applications.
4. **LawBase:** This software handles case and practice management for firms of all sizes. It also integrates with HotDocs and Outlook.

## Questions to ask

Because Practice and Case Management software will have a direct effect on everyday issues, it's important that law firms select a program that works for their specific needs. Here are some questions that can help you narrow the possibilities:

- If we're already using Outlook, Quickbooks, and other applications, what other features in your software can we benefit from?
- What features are included in your application? Calendaring? Contact management? Conflicts of interest checks? Document assembly?
- Does your software integrate with applications we're already using?
- Do you provide a client portal?
- Is customization possible?
- Is your software hosted on servers or in the cloud? Can I access your application remotely?
- Do you provide regular backups? At what intervals? How often do you upgrade your software?
- What happens if I have a maintenance issue? Do you provide training or support?

If you need assistance determining which type of software has the features you need, or if you want help integrating new applications with your existing system, Legal Workspace's application support



specialists can help. You can take advantage of Legal Workspace’s Software as a Service licensing model for certain Case Management or Practice Management applications. Legal Workspace can also move existing licenses for software to its cloud environment.

The work that goes into the daily management of a law firm can be streamlined with Case and Practice Management software. There are many good programs on the market that will save your law firm time and effort. The key is to select the program that integrates well with the applications you currently use and that provides additional features that you need.

*Legal Workspace is a pioneer in cloud-based work environments and data storage designed specifically for law firms. Learn more at [legal-workspace.com](http://legal-workspace.com).*