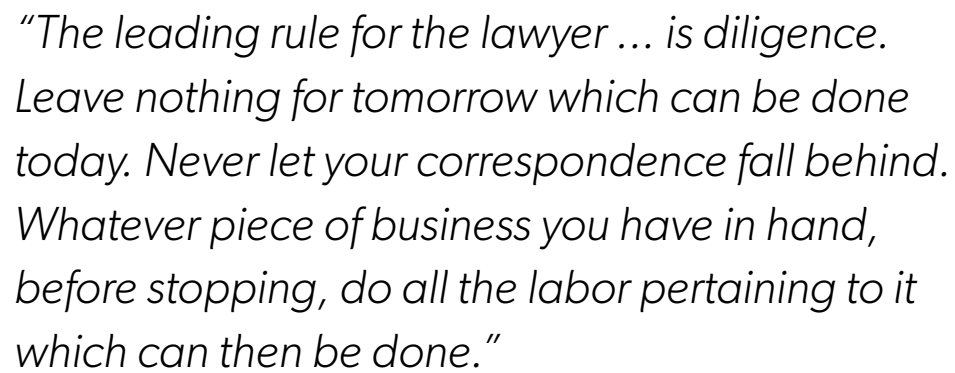


# Why You Need a Legal Practice Management Solution

**Building the Case for Building a Better Law Practice**



A pair of large, yellow, stylized curly braces, one on the left and one on the right, framing the central text.

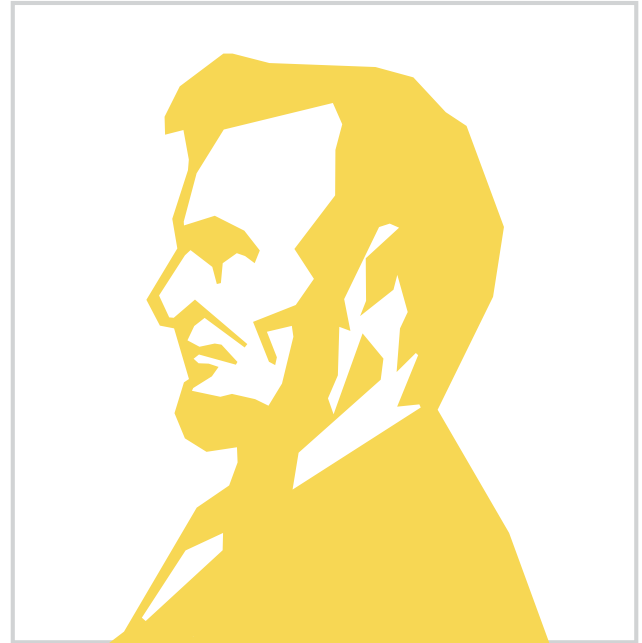
*"The leading rule for the lawyer ... is diligence.  
Leave nothing for tomorrow which can be done  
today. Never let your correspondence fall behind.  
Whatever piece of business you have in hand,  
before stopping, do all the labor pertaining to it  
which can then be done."*

The Collected Works of Abraham Lincoln edited by Roy P. Basler, Volume II,  
"Notes for a Law Lecture" (July 1, 1850), p. 81.

## A LITTLE HONESTY UPFRONT

While Abraham Lincoln's words ring true today (as they always have and always should) there is a very simple and honest fact that prevents us from living up to those most noble of intentions: in a normal day, most lawyers have trouble finding the time to actually do legal work!

There are so many other things that you have to get done when running a law practice, and the number of hours in a day hasn't increased since the days of Honest Abe—there's just a lot more you have to cram into those 24 hours. It's no surprise that so many of today's lawyers are feeling stressed, exhausted, depressed, or burned out.



### Time Crunch

As a lawyer, you must take time away from your clients to focus on business operations like properly storing documents, scheduling meetings, and being accessible all day (and for many lawyers, that means all night as well). You also have to comply with time-consuming reporting, such as performing monthly trust account reconciliations for your bar association. Just as important, all lawyers have to find the time to make sure they actually get paid. For many, this means a lot of time completing time-sheets, calculating bills, tracking payments, and the like.

Not a single one of these actions qualifies as 'legal work,' but every law firm needs to complete them if it wants to be successful. The challenge then is how do you manage your practice in a way that doesn't interfere with practicing law?

That is where a Legal Practice Management (LPM) solution becomes necessary. Today's technology has made new and innovative solutions readily available, focused on helping you simplify managing your law practice and your life.



*As of 2012, there were **1,268,011** licensed lawyers in the United States. That's roughly equivalent to the population of Dallas, Texas or the state of Maine.*

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## DEFINING THE MATTER

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Back to Lincoln's remarks for a moment and one word in particular: diligence. As a lawyer you know it is important to the practice of law; there are both obligations and implications to consider in every matter. Conducting rigorous due diligence is something you would advise for every client. It is equally important for you to do so in determining your need for a Legal Practice Management solution.

So first things first: what is Legal Practice Management? And how can an LPM solution improve your practice and make you a better lawyer?

The American Bar Association's Legal

Technology Resource Center defines Legal Practice Management as a system that provides lawyers with a convenient method of effectively managing client and case information. This includes contacts, calendaring, documents, and other specifics. LPM systems also prevent lawyers from having to enter duplicate data in conjunction with billing and other services. At its core, LPM is the hub for storing and retrieving a firm's information as well as tracking and billing a firm's time and finances.

Essentially, an LPM solution helps you manage the business of your firm and your practice.

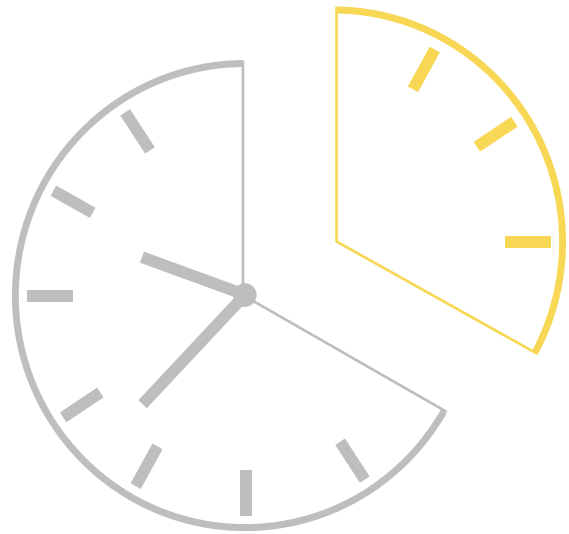
## THE MODERN PRACTICES OF LAW

Today's law firms are different from those of the past. Technologies ranging from cloud-based software services to our modern bevy of mobile devices are allowing more and more lawyers to better manage their legal practices, the business of their practice, and their lives, wherever they are.

Legal Practice Management is often accomplished by using services that facilitate automation in law practices. These services share information with other members of the firm and minimize errors by keeping everyone organized. Repetitive tasks and schedule reminders can also be programmed into these services to remove the need to burden a lawyer with non-billable work and having to remember every upcoming meeting.

LPM not only keeps lawyers and law firms organized, but it also tracks time on behalf of the lawyer. Rather than second-guessing how much billable time they spent on each individual client matter (often at the end of each month or weeks after the fact), lawyers can use an LPM solution to track their time in the moment, apply the right billing rates and description, and store notes about the work being done.

Today's LPM solutions go even further by allowing lawyers or legal staff to associate billable time to matters, quickly creating invoices and securely delivering them to their clients via email, a secure client portal, or in hard copy.

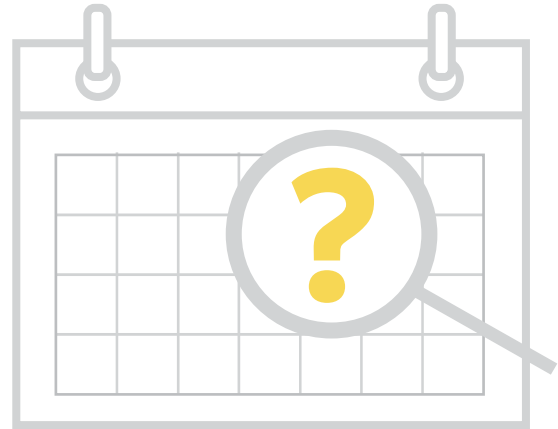


*It is estimated that law firms lose between 10 and **30%** of billable time by recording after the fact.*

## WHAT LPM SOLVES

Implementing a Legal Practice Management solution will do a lot of things to boost the health and performance of your practice. In the day-to-day management of a firm or practice, LPM solutions can get you where you need to be to become a more efficient and effective legal professional. And it does that quickly and cost-effectively.

The law is complex, and so is every lawyers' practice. But a quality Legal Practice Management solution should include important features and functions that simplify the daily management of each lawyer's practice. From organizing your day to organizing your matters, an LPM solution puts all the information you require in front of your eyes and in your hands.



*According to an ABA study released in 2012, **30%** of legal malpractice suits were the result of administrative errors, including failure to calendar or react to calendar items, and lost files, documents, or evidence.*

## FORM AND FUNCTION

The day-to-day management of your practice comes with many complications. First off, where do you have to be? Who do you have to see? And what do you need before you get there? Managing a modern law practice requires that you be supremely organized, keeping track of everything from your day to your documents. LPM solves that.

### Calendars

If time is money, maintaining your schedule is as vital as balancing your bank account. Even more important than that, you have a professional obligation to calendarize and keep track of your appointments, client meetings, court dates, and other critical deadlines. This is a matter where both your practice and your livelihood are on

the line. LPM solutions should keep you on top of your agenda and let others in your firm know what tasks, meetings, and deadlines are ahead so that you meet your obligations and avoid the pain of a malpractice suit. Nearly 8% of lawyer indemnity claims are caused simply by failing to keep a calendar, with payouts totaling \$38M over the past 12 years. LPM solutions include calendaring, a reminder system, and the opportunity to sync your calendar to any device, allowing you to avoid costly mistakes.

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## Matter/Case Management

It's a shut-and-closed case. Your practice matters because your matters matter... to you and your clients. LPM solutions should help to manage all the information and details related to your matters. It should be readily and easily accessible through a centralized database, offer speedy search functions, allow you to see task lists, and check in on status reports.

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## Conflict Checks

Before you can even engage with a client, you need to ensure there are no conflicts. LPM enables greater ease of conflict checking by indexing all records stored in the solution and offering lightning-fast search capabilities. Consider it the search engine for your firm.

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## Collaboration

If you work with more than one person, you're going to have to collaborate. And if you are in the practice of law—whether it's a client, a partner, a paralegal, or an assistant—there's always going to be at least one other person involved in your practice. LPM solutions should allow you to create and compile documents in a way where all parties required to work on those files have an opportunity to do so in a secure and accessible environment. Online communication and version control for documents also allows lawyers to work together more effectively.

***Rule 1.4 of the American Bar Association's Model Rules of Professional Conduct imposes a duty on lawyers to promptly comply with reasonable requests for information. An LPM solution helps lawyers meet this duty by creating a place where clients and lawyers can easily communicate and share information.***

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## Document Management

You can create the world's most beautifully worded briefs and near-bulletproof agreements, but if you can't find them when you need them, they're not going to be as helpful as you intended them to be. An LPM solution must help you manage and control your documents. Precedents are the cornerstone of the legal system and so you need solid document management to maintain the fundamentals and the integrity of your practice. And as an added bonus, LPM solutions can help automate the process for creating documents—an invaluable time saver for seamlessly turning your precedents into fresh files for new client matters.

***Another bonus from LPM is that it helps lawyers meet their file retention duties. For example, Illinois lawyers are required to keep copies of trust fund records and other client properties for seven years after termination of the representation. An LPM helps create and store these records in a permanent format, without requiring a warehouse to store boxes of paper.***

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## DOLLARS AND SENSE

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While the practice of law centers around justice, the business of law comes down to time and money. But you're a lawyer, not an accountant. LPM helps streamline the process to take stock of every dollar and every hour so you don't have to spend large amounts of dollars and hours doing that on your own. With the extra time afforded to attorneys using LPM for accounting and billing, they're able to bill more hours, improving the firm's bottom line.

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## Time & Billing

Watching the clock is no one's idea of a good time, nor is it the best use of your time. LPM solutions should record all billable time, link that to the firm's billing and accounting programs, and provide a system for tracking time and invoicing clients. The less time you spend tracking your time, the more time you have for other things. Like practicing the law!



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## Accounts Receivable

Collecting on accounts is the most crucial aspect in sustaining your practice, paying your staff, and providing for your own livelihood. LPM solutions should record all of your transactions and enable you to manage your revenues and invoices with ease and accuracy.

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## Trust Accounting

Trust accounting in particular is an especially relevant and unique feature required by lawyers and law firms. LPM solutions should help you manage all trust accounting matters, ensuring all client funds are meticulously tracked and associated with the correct client. Bar Associations have incredibly strict requirements regarding trust accounting. Let an LPM solution take care of the work for you by separating trust ledgers from general funds and providing reporting and insight into each.

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## Firm Metrics

By helping you keep track of your firm's time and money, LPM also gives you a picture of how your firm measures up. All that data can be easily analyzed so you not only see what your bills and revenues look like, but also get a deeper perspective on which areas of your practice are most profitable, which of your processes needs improvement, your human resources requirements, and other vital statistics. Data should drive the decisions you make about your firm. LPM can help you track and measure your firm's performance.

What you should be tracking:

- *Revenue by partner*
- *Realization rates*
- *Work In Progress*
- *Value per client*
- *Billing flat fee vs. hourly*

Your LPM solution should help you calculate these metrics so that you can assess your firm's performance and make better decisions.

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## LPM AT THE HUB OF YOUR FIRM

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Move over coffee maker and water cooler. There's a new nexus in today's law offices.

Lawyers and law firms who have successfully implemented a productive LPM solution have made an important discovery: their LPM solution quickly becomes the hub of their firm.

It's where they manage their files, their time, their contacts, their matters, their schedule... virtually everything they need to get their day started and to keep them on track. Well, except for brewing the coffee.

What that means is that LPM solutions plug in to existing services and features of your firm, providing a centralized system for managing your practice, client information, and the like.

Law firms provide an essential professional service to their clients. But today's firms should also operate with a business mind. An

LPM solution will serve as a hub, connecting with other services to provide a completely unified solution for managing all aspects of the practice and the business of law.

LPM solutions can also integrate with full-featured accounting programs to manage payroll and operations expenses as well as client costs and trust accounting. And they can connect with marketing services or business development solutions to help you maximize your reach and build your brand.

Implementing a quality and efficient LPM solution can help your practice grow by offering improvements in time management, billing, and file management. All of that helps free up administrative time, makes you more efficient, helps build your reputation, and ultimately makes you a better lawyer.

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## CROSS EXAMINATION: IS LPM RIGHT FOR YOUR PRACTICE?

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Changing the method by which you manage your practice is going to require a few investments: time and money being the two biggest resources. Of course, that is true for

any investment and a wise investment pays dividends that usually result in boosting those resources. We could all use more time and none of us would object to a bit more money.

## Let's examine all the options

Before you invest any further effort into examining the merits of a Legal Practice Management solution, ask yourself these questions. The answers will point you in the direction of where you need to go, ultimately answering the bigger question—and helping you see the bigger picture.

Question	Yes	No
<i>Do I collaborate with other parties, including other lawyers, paralegals, staff, clients, etc.?</i>		
<i>Is effective time management important to managing my practice?</i>		
<i>Do I need a system for setting task priorities in my case?</i>		
<i>Is a central location for managing client matters, billing and your time important to your practice?</i>		
<i>Do I find that I often lose track of my billable time?</i>		
<i>Do I need a central location for storing different types of documents?</i>		
<i>Do I work on more than one case at a time?</i>		
<i>Do I need to keep track of calendars, deadlines or tasks?</i>		
<i>Do I need a foolproof system in place for conflict checks?</i>		
<i>Do I spend more than one day a month generating my bills?</i>		
<i>Do I wish I had more time to spend focusing on my clients?</i>		

If you answered YES to five or more of these questions, there is no doubt: you need a practice management solution. Answering YES to any one of these questions means that you should probably consider it.

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## THE VERDICT ON LPM

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In a modern, fast-paced age where efficiency is currency and every billable moment counts, most firms will be able to benefit from some form of LPM: a unified and centralized interface where firm members can share information, matters, precedents, documents, and billing details. The days of index cards, file folders, and big clunky calendars have gone the way of the abacus and the typewriter. Useful tools in their day, but not the most efficient or most modern. This is the era of the smartphone, the tablet, and the laptop. Of wifi and the cloud. And legal

practice management solutions live and thrive in this era. So too do the lawyers that use them in their daily practice.

Ultimately, legal practice management solutions do exactly what the name suggests: they offer innovative, intuitive, and ideal solutions for managing your law practice. They're a timesaver. A convenience. A competitive advantage. And an all-around great system for making sure that your practice runs well.

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## BRIEF CASES

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Still not convinced? Or at least, sitting on the fence?

Indeed, every lawyer, every law firm, and every law practice is different. And with those differences come different needs and concerns. As the number one rated cloud-based LPM solution, Clio offers a great deal of flexibility and accessibility, providing thousands of lawyers with time-saving solutions to help them better manage their busy practices.

So, take a closer examination of the matters with these two case studies of two completely different types of firms, each with their own set of challenges and their own specific reasons for choosing an LPM solution.

And why they're happily sitting in the cloud with Clio's Legal Management Practice solution.

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## THE MULTI-LAWYER LAW FIRM

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*The more the merrier, right? But if you have more than one lawyer practicing in your firm or more than one staff member, you're going to need some sort of system for tracking time, work, matters, and contacts as well as a system for collaborating on documents and case files.*

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### The Situation

Gonzales Gonzales and Gonzales, a Portland, Oregon firm specializing in immigration matters, was experiencing rapid growth and realized they were going to be facing a big problem: how to manage their growing practice and all the files, records, and accounting details that would come with that. A shoebox full of receipts and a filing cabinet full of folders wasn't going to cut it. Nor was it very modern, professional, or suitable to the needs of the firm's 11 lawyers or its clients.

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### The Challenge

On average, the firm started 70 new cases per month, which meant managing a lot of detailed information. Since the firm handles family-based immigration claims, these would include such things as visa and green card applications for families, litigation surrounding removal and deportation proceedings, and a great deal of family and personal information and documentation. Often, cases can last several months or even years, further complicating the firm's needs. The system the firm had in place was showing its vulnerabilities and it was not as robust or as flexible as they required. A change was needed.

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### The Trial

The firm set out to track down a solution. They began the process by researching the various practice management solutions out there, reviewing articles, seeking recommendations, and setting up demonstrations for each option. Narrowing it down to five options, they took two months to review and examine them all, weighing all the pros and cons and assessing what was best for their growing practice.

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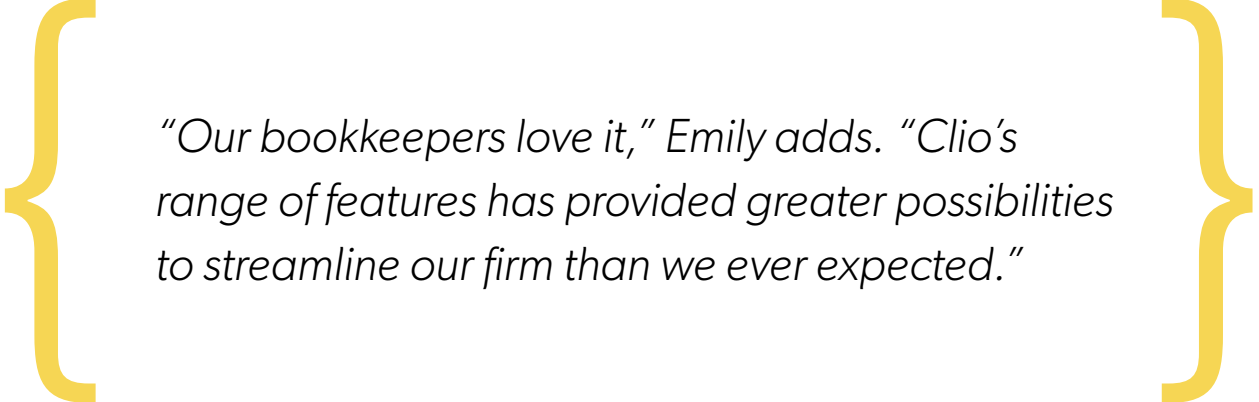
### The Solution

In the end, they chose Clio. Not only did Clio meet all of their practice needs and objectives, but it also offered added business benefits. Marketing, client service, relationship management—Clio offered improvements in all of these areas. And it was also just nice to use. "The thing that really sold us is the interface. It is incredibly user-friendly," says Emily Brubaker, the firm's office manager and team member responsible for researching a practice management solution.

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## The Final Judgment

After implementing Clio, the firm's staff found that productivity improved tremendously: by 30-40% per firm member! They also found that Clio offers an easy-to-use accounting system that generates easy-to-understand invoices.



*"Our bookkeepers love it," Emily adds. "Clio's range of features has provided greater possibilities to streamline our firm than we ever expected."*

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## THE SOLO-PRACTICE LAW FIRM

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*While bigger law firms offer a wealth of resources—IT departments, accountants, marketing and business development teams, and other lawyers to help bring in work and share files—a solo-practice lawyer has to wear all those hats at once. It can certainly be an exciting and rewarding experience, but it means being supremely organized and efficient.*

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### The Situation

Hanging out your own shingle can be a bold move. Suzanne Meehle did just that in 2009. An entrepreneur at heart, she left the her big firm practice and branched out on her own as a solo lawyer law practice to provide services to small businesses in the Orlando, Florida area. A daring step, but the right one for her.

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### The Challenge

The first rule of being a good lawyer is being organized and Suzanne knew that if she wanted her practice to sustain itself, to succeed, and ultimately to grow, she needed to be organized from day one. And moving from the efficient well-oiled machinery of a large law firm to the start-from-scratch basics of a solo practice was not going to be all roses. Suzanne was going to need a system in place to make sure she could manage her matters, her clients, and her practice without the internal support systems inherent in a large law firm.

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### The Trial

Weighing the options meant taking a close look at the practice management solutions available. One of the first trials, though, would be the decision to go for a desktop option or a cloud-based option. For Suzanne, the cloud offered more benefits and greater flexibility, and ultimately was the right solution for her practice. Being accessible from virtually anywhere meant that Suzanne would be able to stand out among her peers and offer her clients many value adds.

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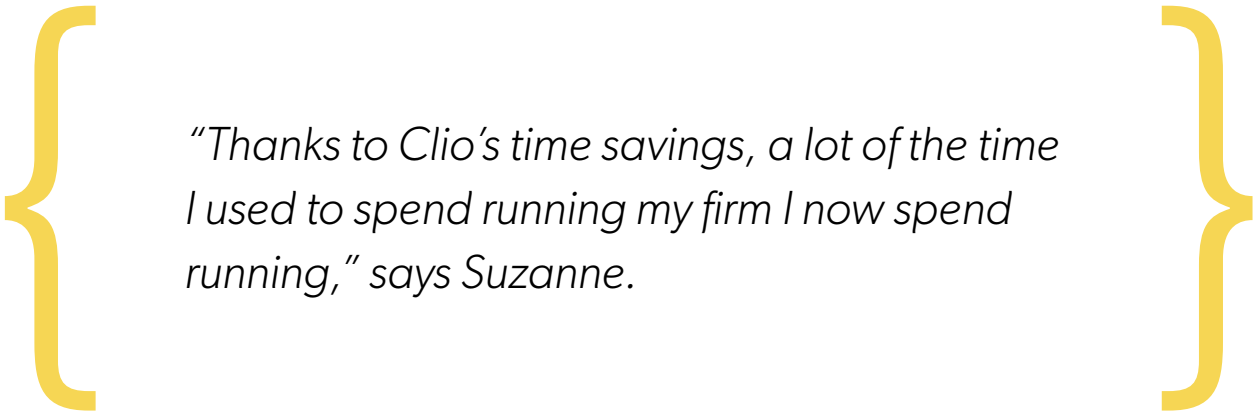
### The Solution

As an independent lawyer, Suzanne needed a practice management solution that was going to offer flexibility, support, and customization to her practice. She was also going to need something that could manage her files, contacts, and calendars. That's why she chose Clio. It integrated well into her practice, suited her needs, and offered an appealing interface and topnotch customer support, all of which helps make her practice run with ease and efficiency.

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## The Final Judgment

Thanks to Clio's effectiveness, Suzanne has seen two significant benefits to both her practice and her life. First, her practice has grown. Better managed and better equipped, Suzanne has been able to build her practice to the point of being able to hire both a full-time paralegal and to share a part-time of counsel lawyer. She's also been able to save a great deal of time, which has allowed her to pursue interests that are close to her heart, not to mention good for her heart; Suzanne has taken up running and has participated in a number of distance races.



*"Thanks to Clio's time savings, a lot of the time I used to spend running my firm I now spend running," says Suzanne.*