

Law Firm Software Survey

Some Surprising Results

20% of the responding firms use Quickbooks for their financial management software

29% of the responding firms do not use document management software



reviews

Time & Billing Software

Finance Software

Document Management Software

Exploring legal software solutions.

Today's consumer is more discerning than ever, and that includes the clients we see in our law firms. With the technology revolution and the explosion of information that is available on the internet, clients no longer come to firms ready to follow their attorney's advice and pay their fees without question. In order to keep up with the technological savvy and demands of their clients, law firms continue to work to meet the challenges they face in handling their growing firms as efficiently as possible. With a business unlike any other, firms continue to strive to find the best software to support their unique needs.

In a recent survey, managers of 51 law firms responded to share their solutions to time & billing, finance, and document management software. While the software solutions they are currently working with meet their needs to a certain extent, the survey responses confirm that firms have yet to find an all in one software that they are satisfied will meet the needs of their firm. It seems we are all

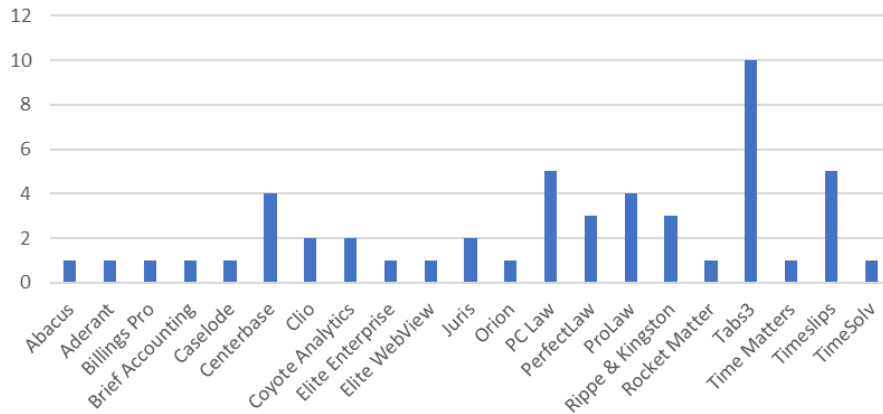
going to be making do as best we can with what we have until someone comes up with a better solution.

Common complaints with current software options include:

- Lack of mobility/remote access
- Poor reporting/report layouts
- Poor or no integration with other firm software
- Lack of customization ability

It is my hope that this survey will help to shed some light on the pros and cons of the most common software currently being used in the industry so that the reader can make an educated decision in choosing the option that best suits their needs. Based on current communication among current law firm managers throughout the country, Centerbase combined with NetDocuments seems to be the current preferred option for mobility and integration. Stay tuned for a future article with more information on these options.

Time & Billing Software



Time & Billing Software

Tabs3 outnumbers the use of any other software by double

By the Numbers

The highest number of respondents use:

Tabs3 – 20%

PC Law – 10%

Timeslips – 10%

Centerbase – 8%

ProLaw – 8%

PerfectLaw – 6%

Rippe & Kingston – 6%

Tabs3 – 20% of total

Pros include:

- All inclusive software
- User friendly
- Statement setup and billing
- Attorneys can enter time via smart phone
- Consistently updated
- Works in cloud environment

Cons include:

- Limited reporting
- Data is hard to extract
- Needs better alternative fee arrangement handling
- Needs a better web solution for time entry

PC Law – 10% of total

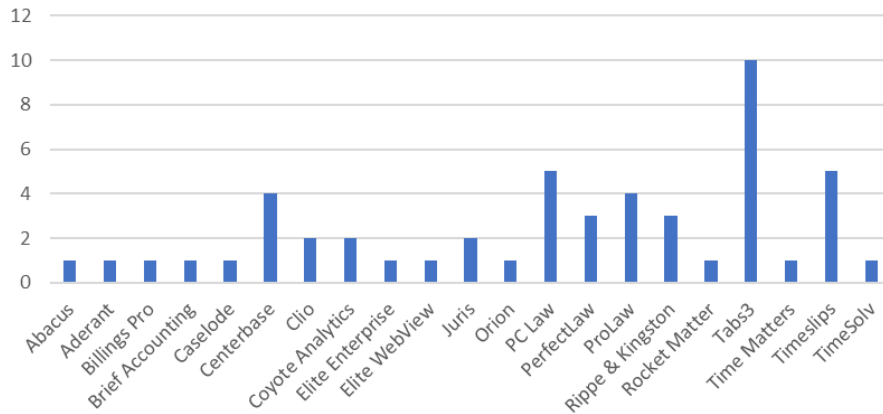
Pros include:

- Simple time entry
- Familiarity after years of use

Cons include:

- Weak reporting
- Not great for accounting
- Not very mobile / not in the cloud
- Clunky / not user friendly
- Shuts down frequently
- Attorneys don't like it

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Timeslips – 10% of total

Pros include:

- Easy to learn
- Has many options
- Adequate

Cons include:

- Not user friendly
- Only admin has license to access
- Needs document management system to attach emails to files
- Limited customization
- Does not integrate with our DMS
- Poor support

Centerbase – 8% of total

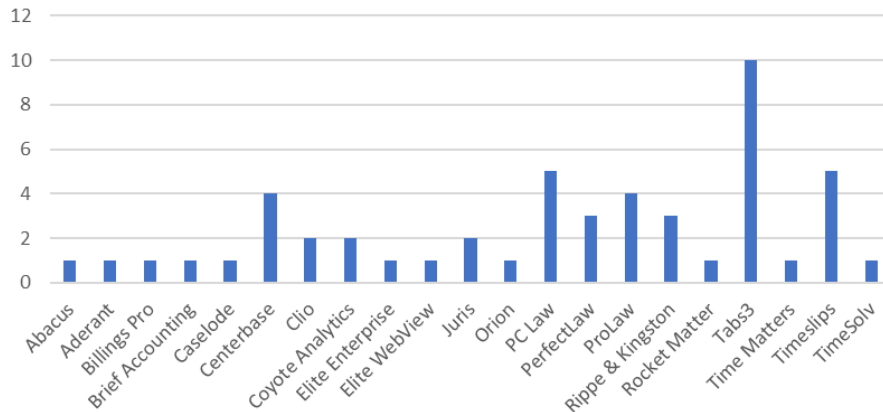
Pros include:

- Integrates fully with Net Documents
- Able to do away with Quickbooks
- Modern, updated feel
- Web based
- Great LawPay integration
- Good reporting features
- They will customize your database

Cons include:

- Bill printing doesn't look professional
- Not many local consultants/trainers
- Not period based
- Large bills can be slow to process

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ProLaw – 8% of total

Pros include:

- Multiple ways to key in time
- Familiarity

Cons include:

- Not very flexible
- We have to work around most of what it does

PerfectLaw – 6% of total

Pros include:

- Fully integrated with finance and DMS
- There is a web based version
- Robust

Cons include:

- Need a better visual calendar
- Need better reports
- Clunky and not intuitive

Rippe & Kingston – 6% of total

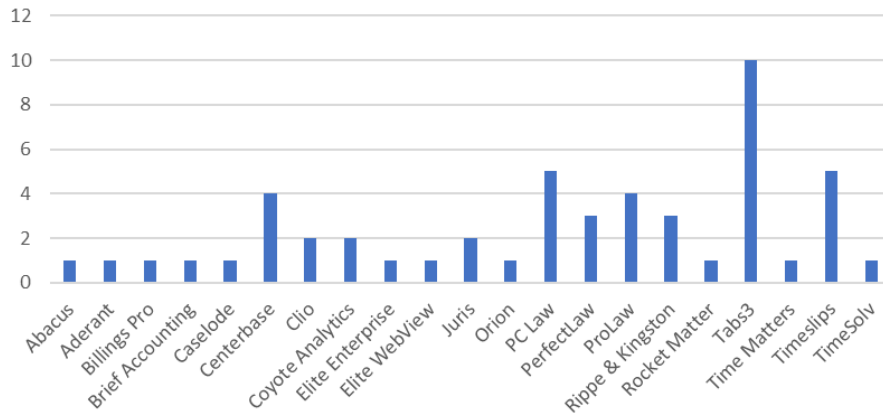
Pros include:

- Low cost
- Cloud based, easy access
- Upgrades included
- All in one solution
- Dashboard / good features / functionality

Cons include:

- Little customization / standard reports are limited
- Quick growth = slow responsiveness, tech support overwhelmed
- Has resulted in high accounting department turnover due to frustration
- Complicated and lengthy training manuals
- Mobile time entry is through partner systems

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Other Items Worth Noting:

Aderant – Support busy, slow to respond

Billings Pro – Easy to enter time but terrible invoice layout and difficult to see invoiced slips

Brief Accounting – Outdated. Cannot email invoices. Cannot move payments from one matter to another. A lot of bugs.

Caselode – Love it but it is becoming outdated.

Clio – No accounting functions. Poor reports. Timers need improvement.

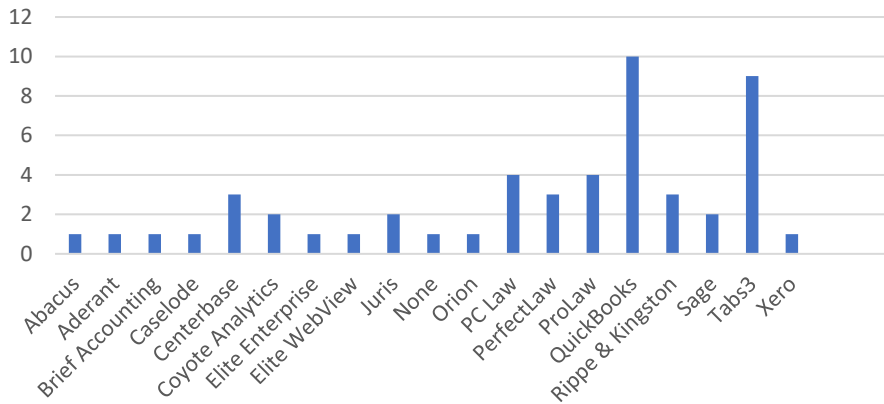
Coyote Analytics – Excellent customer service, 21st century product. Outlook integration has been a small challenge.

Orion – Love it. Full time & billing plus accounting. Cloud based. Great customer support.

Rocket Matter – Simple. Web based. Less sophisticated than others with fewer reporting options.

TimeSolv – Accessible anywhere. Tracks IOTAs. Poor reporting, limited invoice and statement formatting, various oddities re: billing.

Finance Software



Finance Software

Quickbooks surprisingly has the highest number of users in this survey

By the Numbers

The highest number of respondents use:

Quickbooks – 20%

Tabs3 – 18%

PC Law – 8%

PerfectLaw – 6%

Rippe & Kingston – 6%

Quickbooks – 20% of total

Pros include:

- Good reporting
- Easy to use
- Good support
- Easy payroll

Cons include:

- Desktop doesn't integrate with T&B software
- Necessary double entries
- No trust accounting
- QB online too expensive

Tabs3 – 18% of total

Pros include:

- All inclusive
- User friendly

Cons include:

- Complicated – need high level user for report writing
- A/P module is lacking

PC Law – 8% of total

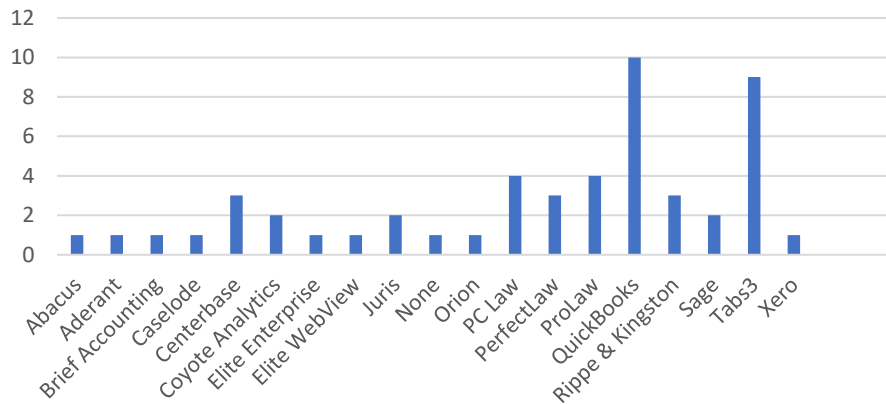
Pros include:

- Simple to use

Cons include:

- None mentioned

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PerfectLaw – 6% of total

Pros include:

- Fully integrated
- There is a web based version

Cons include:

- None mentioned

Rippe & Kingston – 6% of total

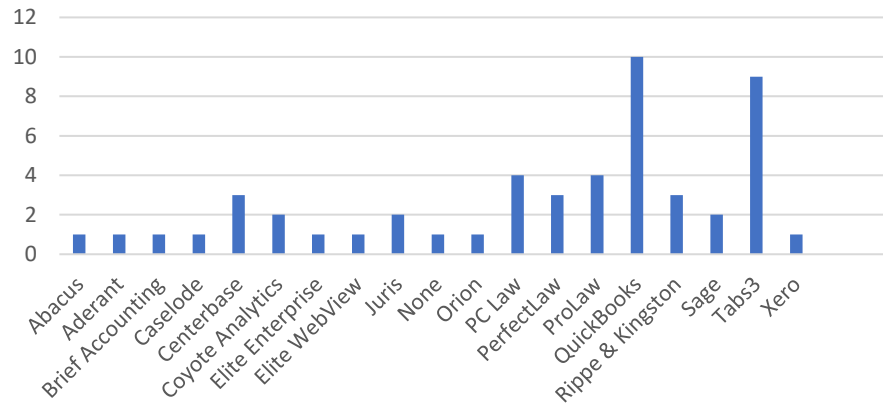
Pros include:

- All inclusive
- Profitability modules & dashboards with many drill down options
- Cloud based / easy access
- Dashboard
- User friendly

Cons include:

- Many reports have to be customized
- Clunky interface resulting in slow syncing
- Existence of multiple accounting periods results in challenging reconciliation process

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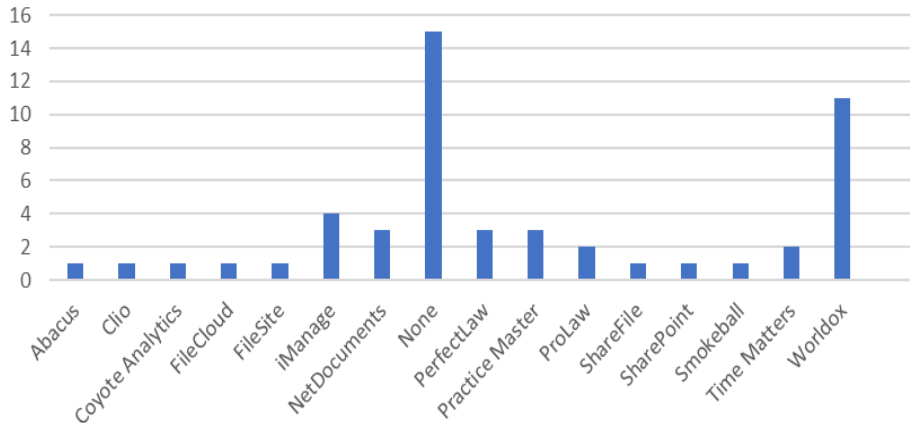
Abacus – Reports lacking. Info layout clunky and not intuitive.

Centerbase – Syncs with bank accounts. Not easy to tab through fields.

Juris – Good integration with T&B. Does not play nice with other software.

Xero – Not designed for law firms.

Document Management Software



Document Management Software

“None” was the surprise answer in this category!

By the Numbers

The highest number of respondents use:

None – 29%

Worldox – 22%

iManage – 8%

Net Documents – 6%

PerfectLaw – 6%

Practice Master – 6%

None – 29% of total

Pros include:

- None!

Cons include:

- Lack of document control
- Difficult to maintain consistent file structure
- Inefficient
- Difficulty finding documents
- No off-site access

Worldox – 22% of total

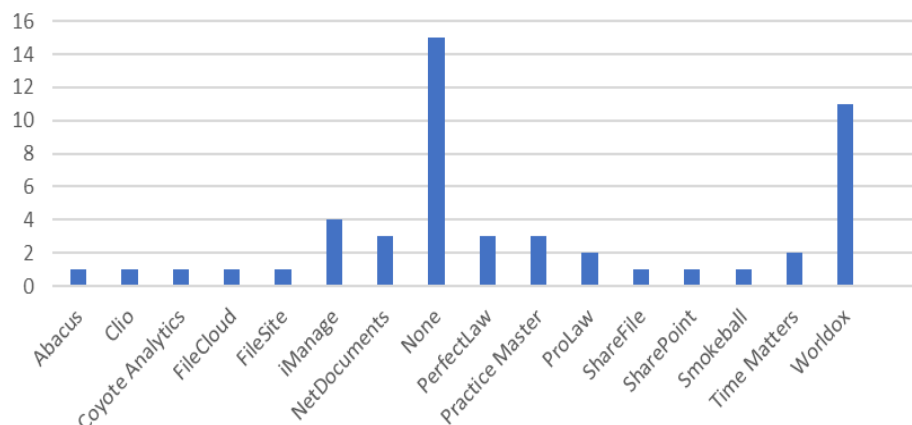
Pros include:

- Very stable
- Cost effective
- Easily searchable
- Can create forced compliance
- Efficient
- Emails maintain native format
- Powerful
- Easy for everyone to use, even if not tech savvy

Cons include:

- Does not integrate with Tabs
- User experience needs refreshing
- Doesn't have the functionality we need any more
- No remote access / not web based
- Issues with Office 365 upgrades

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Practice Master – 6%

iManage – 8% of total

Pros include:

- Good speed
- Versatile enough to create electronic file as file of record

Cons include:

- Searching is tedious and complex, can be hard to find documents
- Requires technical sophistication and horsepower to run smoothly

NetDocuments – 6% of total

Pros include:

- Cloud based
- Great functionality and customization
- Great search capability
- Awesome integration with Centerbase

Cons include:

- Only issue mentioned was related to how a firm performed their implementation and not related to the software itself

PerfectLaw – 6% of total

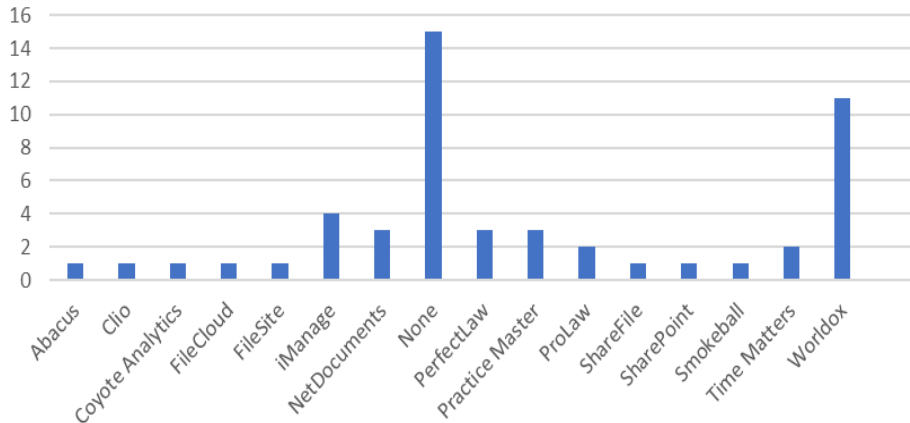
Pros include:

- Fully integrated

Cons include:

- Not flexible
- Not cloud based
- Have to also use MS OneDrive for mobility

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Practice Master – 6%

Smokeball – 4%

Practice Master – 6% of total

Pros include:

- Tabs integration
- Easy document linking
- Robust case management as well as DM

Cons include:

- Customization requires a high level user

ProLaw – 4% of total

Pros include:

- Allows us to be paperless
- Firm Familiarity

Cons include:

- Not very flexible

Smokeball – 4% of total

Pros include:

- User friendly
- Cloud based
- All info in one place
- Calendar syncs with Outlook
- Emails easily saved to matters
- Fantastic customer service
- Can create automated forms
- Creation of tasks, docketing and workflows is easy

Cons include:

- No permissions setting – everyone has access to everything
- No AdobePro integration



Shopping for new software?

Finding a new program can feel intimidating, but it doesn't have to be. Some items to keep in mind:

- Interview the end users regarding their needs, their likes and dislikes of your current system. If you involve your employees in the process, they will be more likely to be on board with the change, and you will find the integration of the new software to be less painful. You will also have a clearer picture of what you are looking for!
- Create a spreadsheet with the must-have's, the would-like-to-have's, and use it to compare apples to apples when looking at your options. If a vendor cannot supply something that is a must have, you can quickly cross them off the list. If a vendor claims their higher price is worth it because of an added service but you don't need that service, the extra cost is not worth it for your firm.
- Ask questions of other firm administrators. We are a helpful bunch. If you are an ALA member, the ALA Listserve is a great resource. You can also join the [Legal Management Exchange on Facebook](#) to ask questions and share ideas.
- Feel free to reach out to me - I am happy to help! Email me at suzette@lawpracticeedge.com.

How do your firm systems measure up?

Schedule a Free Consultation - or Just Take the Survey to See How You Are Doing

[Click here](#) to take the Law Firm Management Survey. The survey covers multiple areas of law firm management and may shed light on areas of focus your firm is currently missing.

YOUR SUCCESS IS OUR MISSION

We support firm administrators and managing partners by teaching them what they need to know to successfully manage the firm and contribute to its success. Regardless of your size, you need a manager who is knowledgeable in managing a law firm, and we can help them get there.

It is our mission to make a difference – take our courses, engage in our consulting services, or reach out through the [Legal Management Exchange on Facebook](#). We consider it an honor to have the opportunity to mentor others.

