

Legal Practice Management Software Guide

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CHOOSE AND MASTER YOUR PRACTICE MANAGEMENT SYSTEM

The right practice management software transforms a chaotic law practice into a systematic, efficient business. This guide helps you choose, implement, and maximize your system.

MODULE 1: EVALUATING YOUR NEEDS

Practice Management Software Functions

Core Functions: - Matter management (case files, status, documents) - Contact management (clients, opposing counsel, experts) - Calendar and deadline management - Time tracking and billing - Trust accounting (IOLTA compliance) - Document management - Reporting and analytics

Advanced Functions: - Client portal - E-signature integration - Court date syncing - Legal research integration - Payment processing - Mobile access

Leading Practice Management Platforms

Platform	Best For	Pricing
Clio Manage	Modern firms, all sizes	From \$49/user/month
MyCase	User-friendly, great support	From \$49/user/month
PracticePanther	Feature-rich	From \$49/user/month
Tabs3	Larger firms, accounting focus	Custom
Smokeball	Document automation	Custom

Platform	Best For	Pricing
CosmoLex	Built-in accounting	From \$89/user/month

MODULE 2: IMPLEMENTATION STRATEGY

The 30-Day Implementation Plan

Week 1: Setup and configuration - Create all user accounts - Import existing contacts and matters - Configure billing rates - Set up trust account - Configure calendar and deadline rules

Week 2: Document templates - Upload your most-used document templates - Create workflow templates for common matter types - Set up automated deadline calculations

Week 3: Team training - Admin training (1 full day) - Attorney training (half day) - Billing and accounting training (half day) - Create custom reference guides

Week 4: Live operation with support - Go live with all new matters - Support available for questions - Monitor for issues and correct

MODULE 3: TRUST ACCOUNTING IN YOUR SOFTWARE

IOLTA Compliance Requirements

Your practice management software must: - Maintain separate ledgers for each client - Never show negative trust balances - Generate complete trust reconciliation reports - Produce an audit trail for every transaction - Allow three-way reconciliation (bank, ledger, client balances)

Monthly Trust Reconciliation

1. Bank statement balance
2. Compare to trust ledger balance (should match)
3. Compare to sum of all client ledger balances (should match #1 and #2)

Any discrepancy requires immediate investigation and correction.

MODULE 4: PRODUCTIVITY OPTIMIZATION

Automation in Practice Management

Automate these common workflows: - New client intake: Auto-create contact, matter, and intake tasks - Statute of limitations: Auto-calculate and calendar deadline - Case anniversaries: Auto-remind for annual reviews - Billing reminders: Auto-send at specific intervals - Document deadlines: Auto-calendar response deadlines

Document Automation

Create document templates that auto-populate from matter data: - Client engagement letters - Demand letters - Routine motions - Status update letters - Closing letters and file transfer

A well-templated library turns 2-hour document drafts into 15-minute productions.

Educational purposes only. Not professional advice. Results vary.

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