20 Legal Management Tips from 20 Experts

Each year Software Technology, Inc. selects a small group of legal technology experts to represent the President's Circle. This year, we asked our President's Circle members and our President, Dan Berlin, to each send us a tip to help others with practice management, office management, and best billing practices.

1. Technology is essential to a law firm, so budget for it annually and don't forget to include training and consulting services to keep your firm running smoothly.

    - Britt Lorish and Sandra Adams with Affinity Consulting Group, LLC

2. Turn off those notifications. Email replies can wait, so can Trivia Crack, texts, and social media marketing. Focus on what you're doing and you will become more productive.

    - Paul Purdue with Attorney Computer Systems

3. When considering a new time and billing system, be sure to check out the software provider's reputation for customer support. Talk to other users of the software.

    - Bill Baker with Baker + Cadence Solutions, LLC

4. Email invoices to your clients. They appreciate less clutter, it cuts down on your overhead, and you get paid more quickly.

    - Donna Brown and Amy Crumpwith Beyond Square One

5. Periodically check for software updates. Keeping your software updated will help you get the most out of it.

    - Don Grady with Business Assistants, Inc.

6. When making sales-related telephone calls, stand up while talking to prospects to better project your voice and enthusiasm.

    - Jim Degnan with CompassPOINT Legal

7. To preserve your cash flow, request replenishing retainers from your clients to ensure timely payments to your firm.

    - Christina Cline with C.R. Cline & Company, LLC

8. Regardless of your profession, listening is always more important than speaking.

    - Judy Best and Rick Bernauer with CyTek Corporation

9. Recycle that record! If your practice management software is integrated with your billing system, then you should be able to create a fee from any record in your software. Think appointments, telephone tasks, documents, notes, etc!

    - Monica D'Amore with D'Amore Consulting, LLC

10. Documents should be easy to save and find to increase productivity. Saving documents utilizing a document management database provides the best productivity.

    - Misty Callicott with Estate Paralegals

11. Failure to secure competent talent to manage your billing and bookkeeping operations will compromise your financial life-line.

- Phil Garver with The Garver Group, Inc.

12. Use different color paper for pre-bills and place them into a three-ring binder for attorney/partner review. It makes billing stand out in the office, gives your managing partner a nice level of comfort and flexibility to carry a binder instead of a bunch of loose-leaf papers, and raises your administrative prowess to an expert level.

- Norman Calderon with Greentree Solutions, LLC

13. Legal applications are great tools if you know how to use them. Take the time to learn the software. It will make you more efficient in the software and your practice.

- David Moon with Lan-Tech, Inc.

14. Integration is key. In our busy lives we seldom have time to do something once, let alone twice. The more tightly integrated your billing, accounting, and practice management is, the less likely you will run into easily avoided errors.

- Cathy Prichard with Law Firm Automation, Inc.

15. Set up automated WorkFlows to automatically bill your time for journal notes, emails, and document production.

- Judy Lassek with Legal Software Services, LLC

16. Having document assembly in place reduces the risk of typos and missing language while providing a consistent presentation of your work product to the court, the client, and other counsel. Not to mention the high "value-added" benefit.

- Edie Zimmerman with Legal Software Solutions

17. Don't underestimate the value of training on basic resources, like Word and Outlook. Most people use what they learned years ago, and do things much less easily and efficiently than they could.

- Renee Kodner and Sheryn Bruehl with River Run Computers, Inc.

18. Use the Windows 'snipping tool' to capture a portion of your screen. You can paste the picture into an email to share or paste it into Word to create documentation. It also has great annotation tools.

- Craig Spillman with Spillman Technology Solutions

19. Use the Statement Designer to create a bill where your return address and the client address fit conveniently into a double window envelope. No more typing envelopes!

- Jeff Krause and Kate Jasaitis with Solfecta, LLC

20. Don't hesitate to ask a satisfied client to provide a testimonial or be a referral. Nothing sells your product or service better than a satisfied client!

- Dan Berlin with Software Technology, Inc.