

The Four Pillars of Successful Practice Management

Managing a small law practice is no easy task. It's hard enough to keep up with clients, cases, court appointments, and the demands of family life on a daily basis, let alone think about how to make your law firm more efficient.

When people talk about practice management, it often sounds like a bullet point list of tools you need to force your staff to use, so that you can have pretty reports and automatically deliver a higher level of service to your clients.

The reality is that yes, buying a practice management system is a must in today's small law practice, but what is it really going to do for you? And will it make your life harder instead of delivering all of the golden promises you hear from the sales person?

Successful use of a practice management system comes down to these four pillars: Calendaring, Cases, Contacts, and Conflicts. Understanding how your firm's daily processes can best match up to what a practice management system can do for you in each of these four areas will be the difference between just buying a solution and leveraging it to grow your business. Understanding this allows you to truly capture the value of what you've purchased and get your employees behind your decision because they will understand how it benefits them.

CALENDARING

We live in a world where we rely on our smartphones, calendars, and task reminders. A good practice management system should keep track of client appointments, court dates, docketing, and, in some cases, offer a notification feature so you and your staff can know about dates or deadlines long before they happen. You should be able to see appointments, not just for you or someone else in your office, but for one matter.

CASES

Whether you call them matters, cases, or projects, the premise is the same. You want a place where important details of the case can be recorded and organized, easily seen and accessible by everyone in the office. A good practice management system should enable each person on your team to pick up the phone and provide any client or potential client with general information about their matter, status, and up-to-date notes.

CONTACTS

Managing contacts by keeping them in your phone or on an array of post-it notes with phone numbers or emails scattered all over your office is not an efficient way of keeping track of this information. Going back to the point above, centralizing information like contact details, best time to call, and spouse or partner information is critical to the high quality service for your clients. What if a client called, but no one got back to them for an entire day because their contact information is only in your smartphone or scribbled on a legal pad in your office? How much time do they lose looking for things just like this over the course of a day, a week, a month? That time adds up and worse, it makes your firm seem inefficient, something clients always seem to remember when the bill comes.

CONFLICTS

Conflict checking is something we hear so many attorneys disregard. The harsh reality is unless you are employing some form of effective contact management, how can you tell if a new client conflicts with anyone you have served in the past? While we'd all love to think that we have the brain of an elephant and that we can

remember the name, number, and favorite color of every client we've ever had, it's impossible. Leaving yourself open to potential conflict issues is the lazy way of setting yourself up for an ethical violation, a complaint, or wasted time.

At its core, a practice management system should be a central database and reference guide for everything that has happened, with every single client or potential client you have. The best way for you to safeguard the business you have worked so hard to build is to employ a practice management system that is specifically designed for a law office like yours.

Tabs3 Software has been a provider of practice management software for law firms longer than nearly anyone else in the business, made by people who make the award-winning Tabs3 Billing software. We understand your challenges and what is needed to make a solution work for you. If you have questions about our products, how we support our clients, or what a practice management system can do for your law firm, we'd love to chat!

[If you would like to see how these four pillars come together in a practice management software, then view an online demo of Tabs3 software here!](#)

FURTHER READING:

- **[The #1 Billing Mistake Attorneys Make](#)**
- **[Windows Explorer is Not Document Management](#)**
- **[How Practice Management Software is Different from Outlook](#)**