# Why Practice Management Software is Where You Should Start Your Day

We've all seen the array of business books on organization, focus, delegation, and management. Each making you feel like you've got a self-improvement to-do list by the time you're finished. But in each book, there's one common theme: systems and processes.

It is a scientific fact that our brains can only assess and complete one task at a time, but somehow we've all been roped into believing that we can multitask our way to the moon. We pile up our schedules, stick post-it notes everywhere, stack up our legal pads full of notes… all the while expecting our brain to remember each phone call, billable task, and to-do item on our plate.

## THAT IS SIMPLY IMPOSSIBLE.

Add your case load, client emergencies, and courtroom negotiations to the mix and you're in serious trouble. For any one person to maintain a high level of organization relying solely on their own brain to keep their law practice, billing, and contacts in order is unrealistic.

Many attorneys manage their practice using the dated method above. They find themselves scattered, but are still able to maintain a decent level of success. As their law firms grow, the critical information they need to do client work starts to feel further and further out of reach. Word documents, emails, reports, and phone numbers are harder to track down, and the piles of paper surrounding their desks gets higher and higher. It is usually at this moment they realize they need a better way of managing their practice.

## ENTER PRACTICE MANAGEMENT SOFTWARE

Practice management, or case management software is often misunderstood. Depending on your practice area and style of work, its use may be different for you than it is for everyone else.

First, let's break down the common elements of a practice management system, and what makes it a perfect solution to the mounting organizational challenges that so many attorneys find themselves in.

A great practice management system is one that can be molded to the way YOU work. Each component is able to address a segment of information you need to organize, and then access it at the drop of a hat. Here are the primary components related to most law practices:

- **Contact Management:** Keeping phone numbers, addresses, and personal information in one place.
- **Case/Matter Management:** Documents, emails, phone calls, internal notes, and granular practice area specific information related to each case file categorized by type, visible on the same screen.
- **Calendar:** Law firms live by their calendar, but the one on your smartphone just doesn't cut it anymore. Share one calendar with everyone in your firm, and bill time right from an event.
- **Docketing:** For litigators, staying on top of court dates, calculating appearances, and communicating that schedule to your clients becomes much easier when docket information can be seen from the same Matter Manager where you review the rest of the matter information.

- **Time Tracking:** Record your time and bill on an hourly, fixed fee, or contingency basis. Complex billing types, tiered rate structures, and referral tracking can easily be set up in more advanced systems such as Tabs3 Billing.
- **Billing and Invoicing:** Convert time entries into beautiful invoices. Set up a template that suits your law firm's image and brand, and track payments once they've been received. Advanced systems offer credit card payment options, improving payment times across the board.
- **Accounting:** More advanced practice management systems include either accounting functionality, or integration with major accounting providers, like QuickBooks. This integration eliminates the need for double entry of time or invoices.

While the components above each serve their own purpose, when properly used together the practice management system enables the law firm to grow and analyze trends in their practice.

## BUT… THERE'S A CATCH

Just purchasing a system doesn't magically turn your practice into a well-oiled machine. Each employee has to manage and track their work within the system. The best way to do this is to begin each day with your practice management system.

If you're truly using what you're paying for, the ideal day would begin with a summary of events and tasks on your practice management system calendar. You take a phone call as soon as your office opens, and you save it to the matter file right away. After you hang up, you prepare the document you discussed, logging time, and saving a copy, all to the same matter file, all in one step.

After you leave for an offsite meeting, a client is in need of critical information you discussed last week and can't find the invoice they need to pay. Instead of your paralegal, who you are paying by the hour, digging through piles of paper on your desk, they resend the invoice via email with a couple of clicks, and communicate the case information without the need to call you at all.

Proper use of a practice management system empowers your employees, reduces your workload, and enables you to be the best attorney you can be. Time and effort are required to put a practice management system in place, but once you do you will see the benefits in ways you'd never imagined.

**If you would like to see how easy practice management is in Tabs3 software, then download a FREE Tabs3 and PracticeMaster Trial here!**

## FURTHER READING:

- **The Four Pillars of Successful Practice Management**
- **Windows Explorer is Not Document Management**
- **How Practice Management Software is Different from Outlook**