Looking for a Legal Software Solution? Here Are 4 Options

It's been two years since I last wrote about legal software solutions. Since then, I've learned about some new options that are worth a look. My latest list includes practice management, case management and customer relationship management systems. These involve:

- **Practice management solutions** — These handle the entirety of the firm's business functions, including accounting, reporting and marketing.
- **Case management systems** — These focus on the firm's internal needs regarding the processing and storing of case and client data.
- **Customer relationship management (CRM) software** — This technology helps you manage your business relationships effectively and assists with the logistics of handling your prospect and client relationships (including automated contact management and progress tracking), allowing you to manage leads and extract data to help you analyze relationships, your sales pipeline, and your success rate with leads and clients.

Regardless of the type of system you are looking for, you'll want to do your homework and follow best practices to ensure you get the right system. This entails defining your needs and goals, taking the time to do research, and then demoing a short list of products.

These offerings are just a small representation of the overall marketplace. Jaffe has no conflicts of interest with any of these companies. Note, too, that the list below was compiled after we looked at product websites, multiple product reviews and user reviews. The product specifications here are the most up to date to our knowledge, but keep in mind that developers are constantly updating their products.

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Lawmatics

Lawmatics is a complete CRM, intake and marketing automation platform designed specifically to help law firms manage their current and prospective clients. Built on a cloud-based platform, Lawmatics offers power, reliability and ease of use. It includes custom fields, custom emails to help with drip campaigns and an automated version of the intake process, as well as automated workflows for activities such as sending documents to get e-signatures, tasks and emails.

System Features:

- Law firm CRM
- Calendar management
- Document management
- Email management

- Task management
- Marketing automation
- Intake management
- Custom forms
- Integrations with Clio, Zapier, Rocket Matter, Practice Panther, Filevine and more

Pros:

- Easy to use and packed with tons of data-driven and highly customizable features that make managing leads and complex workflows easy and less time-consuming.
- Support is fast and friendly.
- Once you are set up, it is fairly intuitive and has great reporting customization capabilities.

Cons:

- A relatively new product, so integrations are limited.
- During implementation, it can be difficult to distinguish between the different contacts (e.g., client, contact, matter, etc.) within the system.

Best for: Solo, small and midsize law firms

Litify

Litify is a legal practice management platform designed to help every type of law firm streamline their processes, manage everything from one location and operate as efficiently as possible from anywhere in the world. This robust legal software combines intakes, matter management, marketing, accounting and more into a powerful practice management platform.

System Features:

- Complete legal practice management software
- Manage cases, marketing, analytics, intake and documents in one place
- Connect directly into existing Salesforce workflows
- Integrate with most software tools (i.e., Docusign, Google Ads, Quickbooks, Outlook, ReleasePoint, RingCentral, Accounting Seed and Call Rail)
- Includes CRM, calendaring and docketing, time tracking, billing and invoicing, and notifications

Pros:

- The system is very user-friendly and easy to learn and navigate.
- The software has powerful tools and functionality.
- The platform is built on top of Salesforce allowing end-users to easily customize the software without needing developers.
- Everything can be customized to meet your firm's needs.

Cons:

- Self-customizations may be too difficult for some users, requiring the firm to hire a Salesforce Administrator, which can be expensive.
- Not the best option for firms with fewer than 20 users unless there is an expectation of growth.
- Unless you plan on using it as is, with no customization, it would be advantageous to have in-house technical resources.

Best for: medium to large law firms

Tabs3

Tabs3 provides a reliable, easy-to-use, seamlessly integrated suite of software products for law firms and legal professionals, ranging from billing to practice management and check-writing to general ledger and trust accounting. Tabs3 enables legal professionals to manage their schedules and matters and track their time and bill from an integrated system. Tabs3 incorporates law practice management, legal billing, legal case management, legal document management and trust accounting seamlessly into one platform.

System Features:

- Billing and invoicing
- CRM
- Calendar management
- Conflict management
- Contract management
- Document management
- Email management
- Legal case management
- Task management
- Time tracking
- Trust accounting

Pros:

- User-friendly, great customer support and reasonably priced.
- The software has a wide array of features, and billing is nicely laid out in a very organized and concise format.
- The billing software has many features that allow you to customize statements according to client needs.
- Customer support is very helpful, prompt and easy to work with. Many knowledge-based articles can help you with any issue you may need to resolve.

Cons:

- In some ways, the software is so comprehensive and has so many features that it can be hard to understand all of its capabilities or find certain features.
- It can be difficult to set up workflows, and customer support is necessary to set up reports.

Best for: Small to midsize firms

Zola Suite

Zola Suite is a cloud-based legal practice management solution for law firms of all sizes. The Zola Suite dashboard enables users to manage and track legal cases from a single place and provides a variety of elements, including activity log, upcoming events, emails and calendar. Zola Suite integrates with users' existing email accounts and automatically detects inbound emails from case-related contacts. Users can convert emails into tasks for their to-do list. Zola's document management capabilities allow users to manage and store documents, control versions, comment on and tag documents and email files as attachments. It also provides a client portal for customers to collaborate, share documents and access billing information.

System Features:

- Task management
- Built-in email
- Document management
- Client portals
- Calendar
- Contact management
- Automation
- Reporting and analytics
- Billing and Invoicing
- Integrates with Lawpay, Rpost, Dropbox, Box, Drive, Onedrive, Ricoh Mfps, Microsoft Word and Outlook

Pros:

- Robust solution that covers everything from case management to client lead intake to comprehensive firm accounting.
- Easy to use and navigate.
- The email integration works well with Gmail and Outlook.
- Customer service is excellent.

Cons:

- There are many required fields in time entry.
- The dashboard is not customizable.
- It cannot connect with services like Zapier.

Best for: small and midsize firms

Before you invest in any legal technology solution, be sure take advantage of the free trial periods most of these providers offer — it is better to spend time upfront trying out different systems than to settle on something blindly. You also might want to create an informal focus group of attorneys and staff to be the guinea pigs to test the product. That way, you can solicit feedback to determine which solution is right for your firm.

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If you have questions or comments regarding software systems, I'd love to hear from you.
Email me, Jennifer Faivre, at jfaivre@jaffepr.com.

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