Lawyerist

FIELD GUIDE

PDF Guide

Buying Products & Services

Take the guesswork out of researching, purchasing, and implementing the right legal tech products and services for your law firm. Our Field Guide answers your essential questions and breaks down the features most important to your business, so you can buy with confidence.
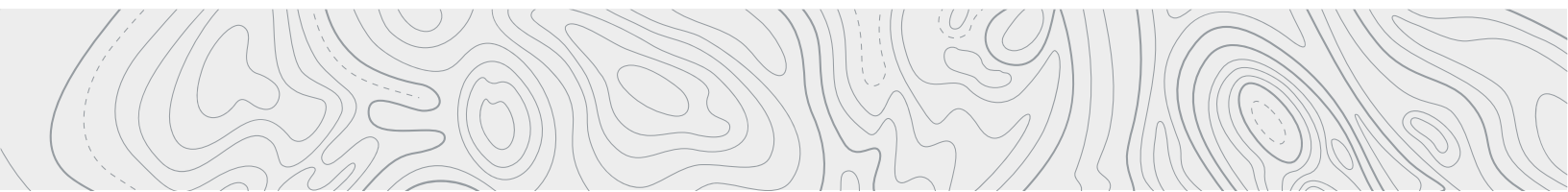
3rd Edition • October 2023

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Introduction

What is the Legal Tech Field Guide?

The Legal Technology Field Guide can help you choose providers based on your firm's specific needs. This guide divides legal technology into particular law office categories and will help you get past the overwhelm of designing your legal tech stack. In this Field Guide, you will determine what is most important to your organization, prioritize your needs, and then whittle your options down to a select few providers.

When you finish with this Field Guide, you should know the preferred structure of your legal tech stack, and what technologies best suit that structure. In addition, you will be armed with concepts to consider, and questions to ask providers as you continue to hone your legal tech stack.

Who Should Use the Field Guide?

Whether you're just starting to build your legal tech stack or are looking to adjust what you currently have, this Field Guide will help you on your journey. Firms looking to move from unplanned, undocumented infrastructure to elegant, thoughtful solutions, will find guidance here.

Who Created this Field Guide?

Lawyerist is a team of lawyers, legal tech aficionados, business coaches, subject matter experts, and stewards changing the legal industry by guiding healthier businesses. We connect small law firm owners with the services and tools they need to run their firms successfully. Our website has a vast collection of review pages designed to give you the right information so you can make a confident decision. While our industry partners do sponsor or highlight certain content, rest assured that our editorial team works hard to give you their honest and unbiased reviews.

Approaching this Field Guide

This guide will help you narrow down your technology options—ideally to two or three potential choices. Once you have determined which products to compare in earnest, go to the source. Contact each provider and put their product through its paces. Each section of this guide provides steps to take when choosing that particular product type.

Elements of the Field Guide

In this tool, as with our online reviews, the legal technology is broken into specific categories for your law office. Within each category, this guide offers specific information on how to choose and compare relevant providers. First, the guide explains what each product category is, what that category does, and how your office can use it. Then, it offers advice on how to compare these providers. It tells you what features are "table stakes", and what features differentiate the individual providers. Finally, it lists the products we find most relevant in each category.

Adopting New Technology

The specific needs of your firm should drive your technology adoption. This means, start with a list of features that your office needs, and then go find them. This process seems simple enough, yet, many offices begin with a product they *think* they should use and then adjust their practices and procedures to fit the tech.

Determining the features your office needs is simple in concept, yet, it can be difficult in practice. Your firm's procedures should drive features. For example, if you need automated intake workflows, it's because your office manages a high load of potential new clients. Take the time to document your procedures before you spend valuable effort searching for solutions.

More than anything, adopting new technology is not a one-and-done process. Obviously, the product landscape evolves. Likewise, technology is constantly advancing to solve problems in new and exciting ways. More importantly, though, your office evolves. You find new ways of doing things, your clients require different methods of interacting, and business generally moves forward.

As such, the documentation you create in your tech buying journey should be a living document. It should not be created today and then shoved into the dusty corners of your filing system. Instead, as we say in our Legal Tech Guide, you should refer to it periodically throughout the year and even create procedures for keeping it up-to-date. This document will drive your future technology decision. Trust us, you will have future technology decisions.

Tips for Adopting New Technology

You are not the first person to look for law firm technology, and you will not be the last. Below are some tips on how to approach the process of adopting new technology.

1. **Avoid shiny object syndrome** - do not let the latest features that a provider just released drive your tech adoption. This approach quickly leads to overstimulation.

2. **Gather internal support during the process** - reach out to key team members and bring them on board. You will need promoters, testers, and first users of the product you adopt.

3. **Build through iteration** - you will never design the perfect system. Read that again. So do not try to build it in one fell swoop at the beginning. Instead, look at your documentation, decide what problems you can solve in a set time period, and solve those problems. Rinse. Repeat.

Start by Asking Questions

As you begin the process of adopting new technology, make sure you've asked these initial questions (and have the answers):

- Have you documented the processes you are trying to solve?
- Do you have someone who will be accountable for decision, adoption, documentation, and implementation?
- Have you set aside recurring time to work on your tech adoption?
- Do you know what done looks like?

What's New in This Edition?

The legal field is famously hesitant to adopt new and cutting edge technologies. Generally, the various rules of professional conduct require a measured approach, decrying reasonableness over all. Amid the public fascination over Artificial Intelligence, however, law firms have been uncharacteristically cavalier. Which, understandably, has lead some firms back to the safety of watching technology pass them by.

We posit, however, that there is a middle road. One where a law firm can safely, securely, and professionally advance in relative lock-step with the overarching technology trends. This has led us, in this edition, to add a section on technology that attorneys should be keeping an eye on. This doesn't mean diving headlong into the fray. Rather, it means keeping abreast of relevant topics and working technology into your firm's tech stack when it suits your needs.

Technology to Watch

This new section is not intended to cover the gamut of what is emerging in legal tech. Think of it as an introduction, or an amuse-buche. We want to highlight topics that law firms might be interested in. However, in these areas, the landscape is changing so rapidly, we couldn't possibly offer a comprehensive treatment of the subject.

Choosing Tech

Although there are some "shiny objects" at the head of this Field Guide, don't let that distract you from its ultimate use---to help you choose technology for your firm. As we reiterate many times below, your processes should drive your technology, not the other way around.

Best,
Zack Glaser
Legal Tech Advisor

Technology to Watch

Keep an Eye on Emerging Technology and Concepts
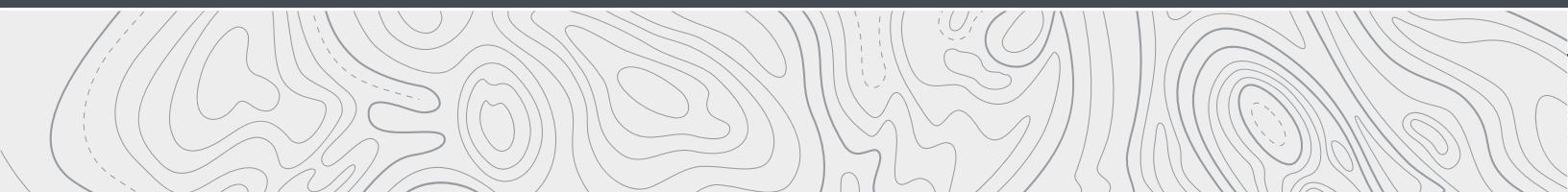
Artificial Intelligence in the Legal Sphere

Few advancements in technology are truly advancements. Often, they are incremental changes that can best be categorized as "adjustments." Fewer still change the landscape of what came before them. Artificial Intelligence, even in it's infant stage, is poised to do just that. Much like the steam engine and precision manufacturing before it, AI is changing how work gets done. And, much like those other advancements, AI can seem a lot like magic to the casual observer.

Although AI can seem unapproachable to most, it isn't necessary to understand the intricacies of Large Language Models (LLMs), Machine Learning, or even Deep Learning to weild AI to your benefit. As Ed Walters says, however, in episode 452 of our podcast, you need to use the tool as it's designed. AI designed to give you the statistically likely next word shouldn't be used to draft a brief. It might, however, be able to help you write titles to blog articles.

Below are a few of our favorite products that are using AI in some form to make their users' lives easier. There are certainly products that we have missed, or have intentionally left out for brevity sake.

ndMax

ndMax is an integrated AI tool from the folks at NetDocuments. It can best be described as an advanced automation tool. It can automate the creation, organization, or even data extraction of documents and information in your firm. It leverages the information you have already created and saved to streamline many law firm functions.

LawDroid

LawDroid's Copilot brings AI to a lawyer's fingertips. The Copilot feature makes an already robust chatbot even more advanced. This no-code legal automation platform lets lawyers build their own virtual legal assistant right into their existing legal tech stack.

CoCounsel

CoCounsel, from Casetext, takes the AI legal assistant to the next level. It is an OpenAI powered Large Language Model (LLM) trained specifically for legal. It can summarize documents, perform legal research, and even search a chosen database.

Spellbook

Spellbook is contract drafting and review software from the folks at Rally Legal. It is a Microsoft Word add-on that is linked to your firm's document repository. It can help redline documents, negotiate proper wording, and even suggest clauses that may be missing from a contract. Like CoCounsel, it is OpenAI powered and tuned for legal.
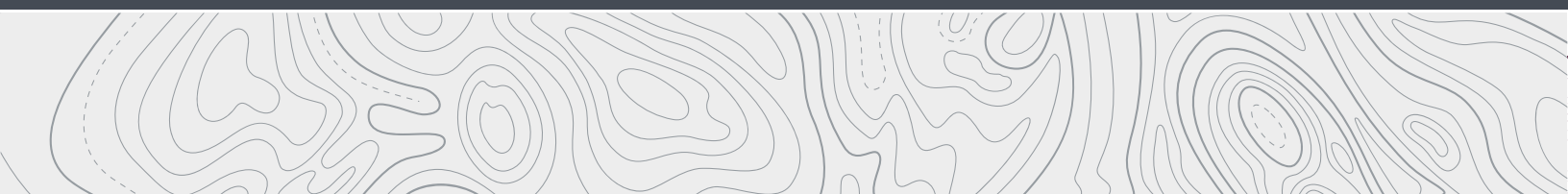
LM[AI]

LM[AI] is a feature built right into the Lawmatics marketing software. It uses LLMs to help firms generate marketing content, client emails, and more. Although it certainly won't do legal research for you, it can save your team from staring at a blank page.

Firm Growth

Discover tools to help you attract and engage clients.

Firm Growth comes from building and maintaining relationships. Healthy client relationships are created through efficient lead generation, successful onboarding, and thoughtful nurturing of existing customers. Take a look at services that will help you wow your clients.

SEO & Marketing

Visibility is crucial to a law firm's success. Search Engine Optimization (SEO) services, and marketing agencies can help your firm stand out. Some agencies work on both SEO and marketing, while others specialize in one or the other. You'll need to assess your own needs before determining which is right for you.

Marketing

Web Designers

SEO Specialists

Intake & Customer Relationship Management

At its most basic, Client (or Customer) Relationship Management (CRM) software could be described as a client contacts database, combined with a to-do list, and a calendar. But, when used right, it can be so much more. Good law firm CRM software gives you a systematic approach to maintaining and strengthening client relationships and trust. This is not just client intake, it's an integral part of a comprehensive Legal Marketing plan.

SEO & Marketing

Where to Begin with SEO & Marketing

Marketing and Search Engine Optimization is about building your firm in the way you want to build it. It is not simply about gaining clients or ranking at the top of a web search. Just because your neighbor is concerned with something, doesn't mean you should be too. Let the particular needs of your firm drive your search.

The providers in this category offer varying services. Some of them you will need, others you will not. For the most part, you will find that this category is divided into full-service marketing providers, and SEO specialists. These skills are not mutually exclusive, and you may find that your firm needs both types of services.

How to Choose

Although we can't expect you to plan your entire marketing strategy before engaging a marketing partner, you do need to have a basic understanding of what you want to accomplish. Take a look at our Legal Marketing Guide for help. Then, use the chart below to focus on two or three providers. Set up meetings with these providers and ask lots of questions.

4 Steps to Choosing Law Firm SEO Services & Marketing Agencies

1. Know Your Rights

First, know what you should expect from software with our Legal Software Bill of Rights.

2. Determine Your Needs

Use our Features List as a guide to determine what these types of providers offer, and what services you need/want. Make a list of these features and prioritize them. SEO and Marketing is not something that is solved overnight, so you'll want to have a plan for what you need immediately, and where you want your marketing efforts to go.

3. Assess Provider Functions and Features

Once you've determined what services are out there and what your needs are, it's time to see how providers align with your vision. In some cases, you can get comprehensive service providers to meet all your needs—although you'll pay more for that. While, other times, you may want to engage someone who specializes in a particular service and has proven results. Use the product recommendation wizard in our SEO & Marketing Portal to help guide you.

4. Try Before You Buy

Although getting a "free trial" from a service provider like this is impossible, you should still get a feel for their work before you engage them. Many of the options in this portal provide online portfolios or examples of their past work. Even if they don't, however, you shouldn't shy away from asking for references and examples.

Many law firm SEO or marketing agencies offer free site audits or SEO assessments. This can quickly give you ideas about what you might improve. Additionally, you'll have an opportunity to see if the agency is a good fit for you. Both SEO and design services contracts can last several months. So, you'll want to work with an agency where you have smooth communication and enjoy working with each other.

Law Firm SEO Services & Marketing Agencies FAQs

What is SEO and how can it help my law firm?

Law Firm SEO simply means ensuring your site appears in Google, Bing, and other search engines. When people search for related topics, you want your page to be as close to the top of the list as possible. An SEO agency works to optimize your website for both of these concerns. Their work can include keyword optimization, content production, link building, and more.

SEO agencies can also help your firm with Search Engine Marketing (SEM). This typically refers to paid search activities like paid search ads, display ads, pay-per-click (PPC), social media ads, and remarketing (or retargeting).

Does my law firm need a marketing agency?

Your law firm obviously needs marketing efforts, but not necessarily a marketing agency. To determine this, complete your initial procedures manual. Then, your firm should have a good idea of your intake processes and where it can be refined. If your system is lacking in Potential New Clients (PNC), or just in the quality of PNCs, you may want to consider using a law firm marketing agency.

What does law firm marketing entail?

Marketing agencies for lawyers work with law firms to manage any combination of marketing functions, often including branding, marketing plan development, website design and development, content marketing, social media marketing, paid ad management, and more. A digital marketing agency can help you refine your brand and tell your firm's story. They help you tell potential clients who you are, who you serve, and why. Once you have a strong brand story, you can use it to guide the development of your firm's digital marketing efforts.

How much should my firm spend on legal marketing?

Obviously, this depends on many factors specific to your law practice. Personal Injury attorneys in major markets will spend more than a general practitioner in rural areas. Tracking your marketing efforts will help you determine what your firm needs to spend, and where. A good marketing agency will help you with this task, whether it's tracking phone calls, Google Ads, or simply your SEO efforts.

How important is a law firm website?

Your law firm's website sits at the core of any SEO or digital marketing campaign. The website is where many of your clients will see your company for the first time. And it is generally the focus of all your marketing efforts. Some of the companies in this Field Guide will build and maintain your website, while others will enhance it in some way. You'll need someone to create your site before using most of these services.

If you're new to this, and in need of some inspiration, take a look at some of our Best Law Firm Websites for some ideas.

Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider essentials every provider should have, specializations and things that set them apart from each other, and important features to account for as part of your decision.

Essentials Every Provider Should Have

- **Exclusivity** - Marketing can be winner-take-most, especially when it comes to search. That can present a conflict if a marketing agency represents direct competitors. Many marketing agencies won't represent direct competitors for this reason, although exclusivity may cost more.

- **Free Consultation** - A free consultation or website audit can help you figure out if a particular marketing agency is a good fit with your law firm.

- **Website Ownership** - Some providers use proprietary software to build law firm websites and it can be hard to move your data if you want to leave. Lawyers should own their website in its entirety once it's paid for.

- **On-page SEO** - On-page SEO involves optimizing the content and metadata of your law firm website pages. This is essential but fairly basic.

Specialties and What Set Them Apart

With Marketing and SEO providers, you usually get what you pay for. That is not to say that inexpensive services are not worth it—or that the expensive services are, for that matter. But the difference between products in this category usually boils down to the level of attention you receive. And specific attention costs money.

Here, you can find providers to build your firm a basic website that will establish a simple web presence, or you can hand over your entire marketing efforts to a full-service digital marketing provider. Likewise, some solutions will educate you on how to optimize your webpage, while others will manage all of your SEO and pay-per-click advertising needs.

Important Features

- **Focused on Law** - A well-designed law firm website with a solid SEO strategy is the foundation of any law-firm marketing plan. Besides just creating the website, companies may offer to draft copy, produce videos, and maintain and support the website.

- **Search Engine Optimization (SEO)** - SEO involves more than just optimizing keywords for search engines, but the end goal is for potential clients to find your website. Note: effective SEO is not cheap, and cheap SEO is rarely effective.

- **Brand Design** - Your brand is more than your firm name and logo. It's a cohesive, consistent look and feel of your marketing materials, logos, colors, fonts, tone of voice, images, and even physical space.

- **Copywriting** - Drafting effective website copy, including pages and blog posts, is a specialized skill, and it can help your firm launch a new law website much more quickly than if you intend to draft the copy yourself.

- **Pay-Per-Click (PPC) Advertising** - PPC advertising puts your search results on top of targeted search queries.

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YOUR PRACTICE.
PERFECTED.

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Full Text Search

Billing & LawPay Payments

Cloud-Based Document Management

Client Intake & Marketing

Time & Expense Tracking

Case Management

Client Portal

Built-In Text Messaging

Try MyCase free for 10 days (no credit card required).
www.mycase.com/lawyerist

Accel Marketing Solutions

OVERVIEW

Accel Marketing Solutions is a comprehensive digital marketing agency for attorneys and law firms. They handle web design, search engine optimization (SEO), pay-per-click advertising (PPC), video production, content marketing, and more. In promoting firms, they focus on creating relevant, trusted content that will enhance your SEO, and increase your potential client conversion.

BEST FOR:

Firms looking for a sustained marketing approach, from awareness to conversion.

Content Marketing Focus | **Reputation Management** | **You Own Website**

Testimonial

"Accel is the best!!! I have been working with Accel for about 6 years and they have done a spectacular job in making sure that my firm is always on the first page and is very often the number 1 firm on the page. They have increased my visibility enormously and that has translated into financial success. They are 5 star for me!!!"

PAUL W.

Sponsored

Featured Product Update

Accel Marketing Helps Law Firms Gain Clients with Custom Educational Content

Content marketing is a fundamental aspect of a lawyer's web presence. But not all lawyers understand what content they should be creating. Many simply want to "go viral" or "get more views" on social media platforms. Accel Marketing understands that law firm content needs a purpose.

Read Full Article...

BluShark Digital

OVERVIEW

BluShark Digital is a digital marketing company born from one lawyer's frustration with the options he had for marketing his own firm. Although they do not solely focus on attorneys, their marketing strategies certainly coincide with what is important to many small and medium-sized firms. They focus on things like SEO, SEM, and mobile optimization. In particular, they emphasize local SEO, and work to highlight reviews from past clients to help attract new ones.

BEST FOR:

Firms looking to rank higher in local search results.

Exclusivity	Focused on Legal	Robust SEO

Testimonial

"BluShark did our website for us when we launched. Now, they're building out new product offerings and even a new practice area for us. They're responsive, available, and knowledgeable... We consider them part of our team."

JUSTIE N.

Sponsored

Additional Details

By an Attorney for Attorneys

BluShark's founder is an experienced attorney and an experienced digital marketer. He created the agency due to his dissatisfaction with the marketing efforts of other agencies he'd hired.

iLawyerMarketing

OVERVIEW

iLawyerMarketing is a digital marketing agency focused exclusively on law firms. Its main strengths lie in SEO, PPC, and website design services. However, it augments those services with content creation, like blog writing and video production.

BEST FOR:

Attorneys looking to aggressively market themselves online through multiple channels.

Focused on Legal | **Robust SEO** | **Targeted Advertising**

Testimonial

"iLawyerMarketing has helped us create a law firm with a regular, steady, and dependable stream of quality personal injury clients. We are able to focus our efforts on providing high quality legal services to injured victims and their families, and leave the online marketing to the professionals at iLawyer."

GREG COLBURN
Colburn Law

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Featured Product Update

iLawyer Harnesses Over-the-Top Advertising to Deliver Impact to Law Firms

Modern law firm marketing isn't just about SEO—despite what many may think. At its core, it's about getting in front of potential clients. Lawyers need to understand who their clients are and advertise as directly to them as possible. A firm's potential clients aren't always sitting on their computers searching the internet for answers...

Read Full Article...
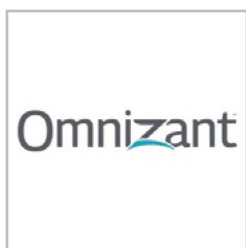
Omnizant

OVERVIEW

Omnizant is a full-service digital marketing company that works exclusively with lawyers. They focus on organic SEO to get your firm ranked well on various search engines. All of their work and content is handled in-house by their US based team of experienced marketers and lawyers.

BEST FOR:

Firms looking for a company who offers end-to-end digital marketing and SEO services exclusively for law firms.

Content Marketing Focus | **You Own Website** | **Affordable**

Testimonial

"Omnizant has made a major impact on my business. Their web SEO optimization, blogs, and webpage content have brought new clients to my site and delivered confidence to potential clients that my firm is right for their job. Hands down, worth the money."

Sponsored

Featured Product Update

Omnizant Builds Accessible Websites to Meaningfully Connect with Clients

The internet belongs to everyone, but not everyone enjoys equal access. Web accessibility is a hot topic these days, and for good reason. Over 1 in 4 American adults live with a disability. That's 61 million Americans living with a mobility, hearing, vision, cognition, or self-care disability. While the ADA has helped those Americans when they're...

Read Full Article...

Postali

OVERVIEW

Postali is a full-service legal marketing firm that offers a whole host of products from website development and search engine optimization (SEO), to direct mail campaigns and pay-per-click (PPC) advertising. Although they provide substantial individual services for attorneys looking to pick-and-choose, their real strength comes from their comprehensive marketing plans, which can include direct mail and answering services.

BEST FOR:

Solo to mid-sized firms looking for comprehensive solutions.

Comprehensive Marketing | **Robust SEO** | **Lead Tracking**

Testimonial

"Working with Postali has been an absolute pleasure. We had very specific goals for our site design and the team went over and beyond to ensure that these goals were achieved. We are extremely grateful for their responsiveness and patience with us as they explained everything and answered every one of our questions. Also, their knowledge of SEO and best practices for site structure—with law firm sites in particular—is quite impressive."

BERNARD BRODY
Brody Law Firm

Sponsored

Featured Product Update

Postali Makes Sense of Law Firm Social Media Management

Social Media is an integral part of most law firm marketing efforts. Even if they aren't doing it well, most law firms have some sort of social presence. Most, however, don't have a thoughtful management plan in place and posts are often reactionary or sporadic.

Postali wants to help law firms make social media work for them.

Read Full Article…

SEO & Marketing

Focused on Law

Search Engine
Optimization (SEO)

Brand Design

Copywriting

Pay-Per Click
(PPC) Advertising

Accel Marketing Solutions

Accel Marketing Solutions is a comprehensive digital marketing agency for attorneys and law firms. They handle web design, search engine optimization (SEO), pay-per-click advertising (PPC), video production, content marketing, and more. In promoting firms, they focus on creating relevant, trusted content that will enhance your SEO, and increase your potential client conversion.

AttorneySync

AttorneySync is a lawyer-owned SEO, PPC, and digital marketing agency founded in 2008 specializing in digital legal marketing. It focuses on search engine optimization, web design, and web development, and features an in-house team that also includes designers, developers, strategists, content marketers, and marketing specialists.

Beam Local

Beam Local specializes in web design, web development, localized online marketing, and conversion optimization. It has law firm clients in both the United States and Canada and has designed and developed websites for solo practitioners and small law firms.

BluShark Digital

BluShark Digital is a digital marketing company born from one lawyer's frustration with the options he had for marketing his own firm. Although they do not solely focus on attorneys, their marketing strategies certainly coincide with what is important to many small and medium-sized firms. They focus on things like SEO, SEM, and mobile optimization. In particular, they emphasize local SEO, and work to highlight reviews from past clients to help attract new ones.

SEO & Marketing

Conroy Creative Counsel

Conroy Creative Counsel (formerly Conroy Consults) is a legal marketing company with over 10 years of experience supplying law firm-specific creative services. It provides website design, online marketing, website maintenance, copywriting, and more.

Consultwebs

Consultwebs is an online marketing and consulting agency that only works with lawyers. It offers traditional website design, white hat digital marketing, and support services, together with video, call tracking, and online chat products, among other services.

Convert IT Marketing

Convert IT Marketing manages targeted pay-per-click (PPC) ad campaigns for law firms, helps optimize your firm's website for lead conversions, and tracks calls and other leads so you can see how your budget is performing.

FindLaw

FindLaw, a service of Thomson Reuters and sister company to Westlaw, is both an online legal resources portal and a provider of law firm websites and SEO services. Read our FindLaw review to determine if it's right for you.

SEO & Marketing

Focused on Law

Search Engine
Optimization (SEO)

Brand Design

Copywriting

Pay-Per Click
(PPC) Advertising

GNGF

GNGF (Get Noticed, Get Found) is a full-service marketing agency that works exclusively with attorneys and law firms. It's also an educational resource, providing CLEs, podcasts, and guides to help attorneys do their own marketing.

iLawyerMarketing

iLawyerMarketing is a digital marketing agency focused exclusively on law firms. Its main strengths lie in SEO, PPC, and website design services. However, it augments those services with content creation, like blog writing and video production.

Juris Digital

Juris Digital is a full-service digital marketing agency that provides website design and development, SEO, content, and paid search marketing services to law firms.

Justia

Justia is both a lawyer directory and portal and also creates law firm websites and attorney SEO services. Justia's lawyer directory offers both free and premium listings. Justia uses bar association information to create profiles for all lawyers in the United States. Those lawyers that pay a fee to claim their profile will also appear on the Legal Information Institute (LII) website.

SEO & Marketing

LawLytics

LawLytics is a website marketing agency built exclusively for lawyers and small law firms to empower them to manage their own content marketing via a user-friendly website platform and dashboard.

LawRank

LawRank is a comprehensive digital marketing agency for lawyers. They provide website creation, PPC advertising, social media marketing, and content creation. However, their focus is on SEO. And, as the name implies, getting your site to rank highly in a search engine.

Mockingbird Marketing

Mockingbird Marketing is a full-service digital marketing agency that focuses exclusively on marketing for lawyers. Mockingbird takes a broad approach to marketing for attorneys and law firms to help you focus on lawyering while it takes care of the rest.

MeanPug Digital

MeanPug combines multiple marketing and outreach services under a single company. Many companies, even those focused on the legal market, offer only discrete services: website design, SEO, paid advertising, or community outreach and live events. MeanPug does it all.

SEO & Marketing

Omnizant

Omnizant is a full-service digital marketing company that works exclusively with lawyers. They focus on organic SEO to get your firm ranked well on various search engines. All of their work and content is handled in-house by their US based team of experienced marketers and lawyers.

PaperStreet

PaperStreet is a website design, SEO, and internet marketing company. It has been around since 2001, and has designed (or redesigned) nearly 1,500 law firm websites in that time. These sites have been along the entire design spectrum, from simple redesigns for existing law firm websites, to fully-customized, made-from-scratch, projects for full-on rebranding or new firm launches.

Postali

Postali is a full-service legal marketing firm that offers a whole host of products from website development and search engine optimization (SEO), to direct mail campaigns and pay-per-click (PPC) advertising. Although they provide substantial individual services for attorneys looking to pick-and-choose, their real strength comes from their comprehensive marketing plans, which can include direct mail and answering services.

Rankings

Rankings manages a select number of SEO services for law firms who are looking to maximize their intake. They use a creative approach to their campaigns to help you rank on the first page of Google's search engine results pages. Their sole focus is on helping attorneys and law firms generate more leads from the internet. Accordingly, pricing of campaigns will vary based on your firm's particular needs, the market, and the efforts of your competition. Use this Rankings.io review to determine if they are a fit for your law firm.

SEO & Marketing

Scorpion Marketing

Focused on Law	Search Engine Optimization (SEO)	Brand Design	Copywriting	Pay-Per Click (PPC) Advertising
○	●	●	●	●

Scorpion focuses on all things digital marketing, from website design and SEO, to online reputation monitoring. It has four offices in the United States and has worked with companies both domestically and internationally on their marketing needs. Scorpion's law marketing is certainly robust, but not exclusive.

Spotlight Branding

Focused on Law	Search Engine Optimization (SEO)	Brand Design	Copywriting	Pay-Per Click (PPC) Advertising
●	○	●	●	○

Spotlight Branding is a digital marketing services company that focuses on making you an unforgettable lawyer by crafting a premium brand for your firm. Their unique approach to web design, content, and legal marketing takes a people-first approach rather than focusing solely on search engine rankings. Instead, they opt to make their clients authoritative and memorable. They build law firm content with an eye toward driving more referrals, creating repeat business, and attracting high-quality clients.

Stellar SEO

Focused on Law	Search Engine Optimization (SEO)	Brand Design	Copywriting	Pay-Per Click (PPC) Advertising
●	●	○	●	○

Stellar SEO, as the name implies, is an online marketing company specializing in Search Engine Optimization. Specifically, however, their talents lie in link-building and content marketing. It's what needs to be done after you've maximized your on-page SEO. If you're at the end of the line with your basic website optimization, Stellar SEO may be worth a review.

Uptime JurisPage

Focused on Law	Search Engine Optimization (SEO)	Brand Design	Copywriting	Pay-Per Click (PPC) Advertising
●	●	●	●	●

Uptime JurisPage is a digital marketing and web design company focused on helping small and medium-sized law firms "turn clicks into customers." They specialize in SEO, Google Ads, website design, and content marketing.

Want to learn more?

Marketing & SEO service providers offer a range of different services based on a law firm's needs. Once you've determined what type of partner you're interested in, you can find more information in the Marketing & SEO product reviews on our website. There, you'll find an enhanced features chart, user reviews, expert analysis, and more.

↗ Read Product Reviews

Intake & Customer Relationship Management

Where to Begin with Intake & Customer Relationship Managers

Customer Relationship Managers (CRMs) help you manage your clients' experience—from first meeting to last. And we all know a good client experience can help set you apart from the crowd (as can a bad one). These products, at their most basic level, allow you to set meetings, and manage contacts with potential clients. However, if you use them well, they'll allow you to extract data so you can analyze your workflows, your relationships, and your success rate with new and current clients.

A good law firm CRM stores contact information (including legal needs), notes from previous interactions with each contact, and biographical data about the client. With previous interactions tracked, you can engage on a more personal level, rather than playing catch-up for the first few minutes of each meeting. Many CRMs will also motivate you to be proactive in how you interact with your clients.

What's the Difference between a CRM and Law Practice Management Software for Client Intake?

A CRM differs from law practice management software because most LPMS don't really focus on client intake, client acquisition, or relationship management. A robust LPMS typically focuses on being more productive with existing clients and matters. Still, many LPMS have updates and features that start to feel more like CRM software.

In this Client Intake, CRM, & Marketing Automation Software section you can compare features, read community reviews, get additional details, and find the best application for your law firm.

The ROI of Legal CRM and Automation Technology

The future of legal client intake won't revolve around manual data entry or a footrace to respond to new inquiries by phone. Instead, it lies in customizable automation.

The Problem: The legal industry has become bloated, laden with administrative tasks that dominate the day, and in dire need of modernization. When your law office is overwhelmed, your clients will be underwhelmed.

The Solution: Law firm technology can help law firms create a more convenient, transparent, personalized, and efficient client experience from the legal client intake process forward. By enhancing the client experience, law firms can foster stronger relationships with their clients and deliver superior service.

We surveyed 130 law firms operating in 34 states in the U.S. on the legal client intake process — from Washington to Florida, California to Vermont. With the data we collected, we released this ROI report to showcase how technology can optimize data collection and management processes, keep data centralized, allow teams to capture more leads, and improve overall customer service.

OF LAWMATICS CUSTOMERS SURVEYED:

95%
saw an increase
in revenue

75%
saw an increase in
customer satisfaction

78%
saw a decrease in
lost prospects

Lawmatics is the #1 automation platform for law firms, offering legal client intake, CRM, marketing automation, billing, and much more, all in one easy-to-use software. With Lawmatics, law firms streamline their operations, impress clients, and win more business.

Download [this report](#) to see how law practices of all sizes across the USA drive growth and efficiency with legal CRM.

Visit **lawmatics.com** to learn more and get a personalized demo! lawmatics

How to Choose a CRM

In selecting proper software, ask yourself, "What do I want to achieve with a law firm CRM?" If you're unsure, take a look at your Marketing Plan (or create one using our [Complete Guide to Legal Marketing](#)). Don't just grab software off the shelf and start using it. Instead, plan, document your processes, and then determine your needs.

5 Steps to Choosing a Law Firm CRM

1. Assess the features you need in a law firm CRM
If you don't have CRM software, or the one you have doesn't meet your needs, then ask yourself what features your firm would benefit from. Go back to that Marketing Plan and determine what you want to do. If you don't know what features will accomplish that, yet, take a look at the Features list below. It should give you a good idea of what is out there.

2. Determine its customizability.
Once you find software with the features you're looking for, determine if you can customize those features to fit your needs. How difficult is it to make the law firm CRM fit your needs? Alternatively, does it come ready-to-use (or almost ready-to-use) right out of the box?

3. Find out how easy it is to learn and work with.
Ease-of-use matters in all kinds of ways. First, you'll need to learn it yourself to get comfortable with it as a solution for your firm. And if you anticipate needing to train other people on the software, make sure you and your colleagues will have plenty of resources available. Comprehensive documentation should help you learn how to use your fancy new tool without too much issue. And if it is tricky to learn (and, probably, even if it isn't), a good law firm CRM should offer free training.

4. Evaluate how it will integrate with your current software.
Does it integrate with your LPMS? What about your email, or your calendar? Processes can get really cumbersome if your new law firm CRM exists on a digital island. That means more things to download, transfer, and pay attention to. Integration with Microsoft 365 or Google Workspace, is often extremely helpful, if not a necessity.

5. Try before you buy.

After you've narrowed down your choices, give them a test run. Most have a free trial. When putting new law firm CRM software through its paces, see if it works by importing just a few contacts, rather than your entire client list. See if you like the interface and the experience with 30 clients first, before you try it with 3000.

Law Ruler
by profitsolv

Keep track of every lead for your law firm.

With Law Ruler, capture leads immediately, automatically nurture prospects, and eliminate wasted time with our Intelligent Client Intake.

" What we liked so much about Law Ruler was it eliminated data entry errors. It really has streamlined our intake and improved client retention.

" Without Law Ruler, we would need 2-3 more employees to perform the same tasks each week.

Schedule Demo
www.lawruler.com

Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider the essentials every provider should have, specializations and things that set them apart from each other, and important features to weigh as part of your decision.

Essentials

- **Automated Workflows** - A core feature of marketing automation software and many intake and CRM tools is the ability to automate workflows like follow-up emails after a potential client inquiry, pre-consult questionnaires, new client onboarding, and more.

- **Calendar Sync** - Sync up your calendar so you can see associated appointments when viewing a potential client's record.

- **Email Sync** - Sync up your email account so you can see emails sent or received when viewing a potential client's record.

- **Appointment Scheduling** - With appointment scheduling, you can connect your calendar and let potential clients pick consultation slots right from your website.

Specialties and What Set Them Apart

With Intake & CRM products, the differentiators are in automations and integrations. Yes, each product will have some level of automated workflows and will integrate with select products. But not all automations and integrations are created equal.

Automation differences stem from a greater set of triggers and actions (the two elements of most automations), and ease of use. Some products will have standard automations for you to choose from, while others will make it easy for the typical user to create automations based on their own needs.

Similarly, integrations can vary widely by product. Not only do some products offer a greater number of integrations, but the amount of data that flows from one product to another can vary dramatically. Look for two-way integrations and an Open API (application programming interface).

Features Included in This Guide

- **Document Templates** - A template can help get you up and running with your software more easily when it comes to intake questionnaires and engagement letters.

- **eSignatures** - Allow clients to sign and return documents quickly, using their computer or phone—but not a printer.

- **Analytics** - See reports like the number of clients in each stage of your marketing or intake process, or the return on investment from your various marketing investments.

- **Text Messaging** - While email is a relatively standard part of most software, your clients may prefer text messaging. If so, you'll want to track them in your software to see your conversations associated with potential clients.

- **Client Portal** - Communicate with clients, exchange documents, and provide clients with secure, real-time information on the status of their case. Client portals can set the tone with clients from the beginning.

Lawmatics

OVERVIEW

Lawmatics is more than a legal-specific Client Relationship Manager (CRM). It is an automator that boasts client intake and marketing features as well as client portal, task management, and billing features. With it, lawyers can better communicate with their clients from the education portion of their marketing funnel, to client intake, all the way to dis-engagement letter. Lawyers who are looking for substantial functionality in their CRM will likely want to review Lawmatics.

BEST FOR:

Solos to medium-sized law firms taking an active role in their marketing and looking to streamline their intake process.

Automations | Integrations | Marketing Tracking

Testimonial

"I had been moving toward a virtual practice for a long time, and the additional time [during the pandemic] has been a blessing in disguise. Lawmatics has accelerated my practice in ways I couldn't have imagined! It has allowed me to focus on the high-level goal of planning and setting up my transition to the role of CEO for my firm. It's incredibly exciting."

BILL FARIAS
Esq. Farias Family Law, P.C

Sponsored

Featured Product Update

Lawmatics Announces Long-Awaited MyCase Integration

Lawmatics is a client relationship manager (CRM) specifically built for law firms. Most lawyers know it for its easy-to-use automation tools and its ability to track marketing efforts on top of client intake. In the current market, however, it is also gaining interest for its ability to remain independent.

Read Full Article...

Intake & Customer Relationship Management

CallRail

CallRail is marketing analytics software. It helps you track the return on your outreach investments. Whether it's your social media, your client relationship manager, or other platforms like Google Ads or Google Analytics, CallRail can help you manage your efforts.

Captorra

Captorra is a cloud-based Customer Resource Management (CRM) system that can help you manage your client intake process, provide analytics on your marketing sources, and provide out-of-the-box workflows for your practice. Although it integrates with a laundry list of third-party products, it has enough built-in features that it could easily add value to a firm on its own.

Clio Grow

Clio Grow is a law firm Customer Relationship Management system (CRM). It was previously called Lexicata, and is now part of Clio's legal software suite. This means that it can easily be used in concert with Clio Manage. However, it can still be used independently, if you so choose.

Freshsales

Freshsales is part of the Freshworks suite of products for customer (client) engagement, designed to work together. The different apps include CRM, marketing automation, and more.

Intake & Customer Relationship Management

Document Templates · eSignatures · Analytics · Text Messaging · Client Portal

Law Ruler

LawRuler is a Client Relationship Manager from ProfitSolv, the makers of Rocket Matter, TimeSolv, CosmoLex, and more. With its mass torts and personal injury focused integrations, LawRuler is likely best for lawyers who are handling high-volume intake and are looking to track their marketing efforts.

Lawmatics

Lawmatics is more than a legal-specific Client Relationship Manager (CRM). It is an automator that boasts client intake and marketing features as well as client portal, task management, and billing features. With it, lawyers can better communicate with their clients from the education portion of their marketing funnel, to client intake, all the way to dis-engagement letter. Lawyers who are looking for substantial functionality in their CRM will likely want to review Lawmatics.

Want to learn more?

CRMs range in complexity from enterprise products like SalesForce, to simple Excel spreadsheets. Once you've narrowed the field, head over to our Client Intake, CRM, and Marketing Automation portal to learn more. There you'll find enhanced feature charts, user reviews, expert opinions, and more.

↗ Read Product Reviews

Service Delivery

Discover tools to help you serve your clients.
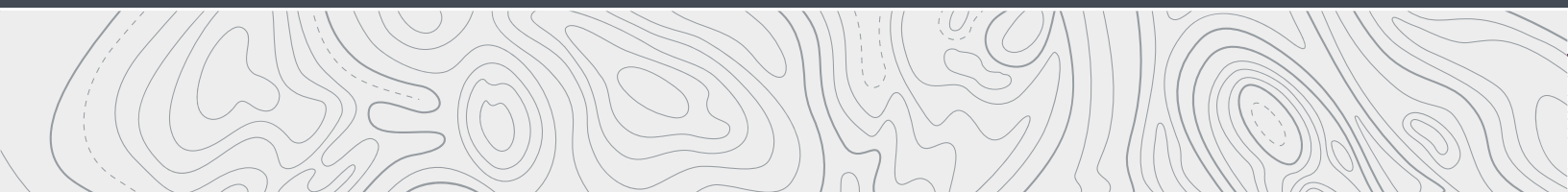
After clients hire you, you want to ensure your business has the tools to effectively deliver top-notch legal services. Although you'll need quality legal research tools, service delivery goes beyond simply practicing law. Healthy firms manage case information efficiently, share and organize documents safely, and produce end products with ease. Browse products that help you deliver outstanding legal services.

Law Practice Management Software

A modern legal practice needs reliable software for managing the various components of its business. Not only should an office be able to set and organize responsibilities, but it should be able to confirm those actions were performed—and performed well. Many offices turn to Law Practice Management Software (LPMS) for this.

Document Management & Automation

Document automation, for lawyers, is not an absolute necessity, but it's getting there. And we would certainly suggest it. Using some of the tools in this portal, a firm can connect with their clients more quickly, generate intake materials with less effort, or even create pleadings at the touch of a button.

Law Practice Management Software

Where to Begin with Law Practice Management Software

There is an abundance of [law practice and legal management software](#) to choose from. And there is more coming onto the market almost daily. Even if you have identified your firm's specific needs, it's a challenge to sort through dozens of products to find a good fit.

How to Choose

There is no silver bullet when it comes to Law Practice Management Software. Unless your software is custom built, you will make sacrifices in features, performance, or even processes. The key is to get your software that works in a way that is as close to your own procedures as possible. As you'll see below, the most important step is determining what those procedures are.

4 Steps to Choosing Law Practice Management Software

1. Know Your Rights
First, know what you should expect from software with our [Legal Software Bill of Rights](#).

2. Determine Your Needs
Next, identify your firm's specific needs. Break down your legal management software requirements into must-have and nice-to-have features. (Use the feature descriptions below as a guide.)

One of the best places to start is to lay out your office procedures, from start to finish. Write them down using something like OneNote, or Google Docs. Then, look for legal management software that fits your needs. Find out if your office needs software that has robust workflow systems, or if you need something that will integrate with third party document automation software. For example, if you are a Personal Injury firm, you'll likely want something that syncs well with your current CRM and client intake software.

3. Filter Your Law Practice Management Software Choices

With your requirements in hand, use the feature filters in the list below to narrow down your choices. Browse the product pages, read the community reviews, and narrow your choices to 1–3 likely options. Or, for a simpler solution, use our Product Recommendation Wizard in the Portal to narrow your options for you.

4. Try Before You Buy

Finally, sign up for a trial account with each of the likely options, put them through their paces, and select the one that will work best for your firm.

Law Practice Management Software FAQs

What is Law Practice Management Software?

Law Practice Management Software helps attorneys perform many of the practice functions necessary to run their offices. Generally, this software will handle Matter Management, Client Management, and Task Management, at the very least. But it could also include things like a Client Portal, trust accounting, and document assembly. Typically, this application will house information about your files and help organize them in a way that is easy to interact with. Although one can run an office without legal management software, the functions it serves must be addressed somehow.

Do I really need Law Practice Management Software?

Every law office needs a practice management system. For some, it can be as simple as a Google or Excel spreadsheet tracking your time, while others may need something more comprehensive that helps manage projects, clients, matters, and timekeeping all in one place. Everyone needs some of the features offered here, the question, generally, is, "how many?"

What is the difference between LPMS and CRM?

Although some of the functionalities of these categories of software will inevitably overlap, in general, LPMS tools focus on Matter management, while CRMs are geared more toward Client management. A CRM will help your firm with intake, and keeping in touch with your clients after their case is handled. An LPMS will usually manage what comes in-between those two.

Are cloud-based LPMS applications secure?

No one can guarantee the security of anything on the internet. Yes, most cloud-based LPMS providers use SSL security while your information is in-transit and they encrypt your data while it sits on their servers. However, you should feel comfortable asking this question of your provider and be leery of any service that can't give you detailed information on their security practices.

What does Law Practice Management Software do?

At a basic level, an LPMS should coordinate multiple integral functions of your law practice. In general, they will handle Matter Management, Task Management, Document Management, and Client Management. Although, most of the products in this portal go well beyond those functions.

What is the best Law Practice Management Software for my firm?
As lawyers are fond of saying–it depends. The Law Practice Management Software landscape is vast and diverse. Some software is built for specific practice areas, while others are more general in nature. Some software is all-inclusive. Still, others intend to act as solid hubs through which add-ons and integrations interact. Your neighbor's solution will not necessarily work for you. First, determine and prioritize the features you need. Then, search for a provider that fits those requirements. That's exactly where this guide comes in. For quick recommendations, you can also use our [Product Recommendation Wizard](#).

Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider the essentials every provider should have, specializations and things that set them apart from each other, and important features to consider as part of your decision.

Essentials Every Provider Should Have

- **Case/Matter Management** - Matter management is the defining feature of law practice management software, of course. However, some software targets specific practice areas and may implement case management in different ways in order to manage information specific to those practice areas.

- **Timekeeping** - Timekeeping is a core feature of practice management software, essential for lawyers who bill by the hour and useful even for those who don't.

- **Task Management** - Basic task management includes creating tasks with due dates that can be associated with cases/matters and assigned to different team members. Some products stick to pretty basic task management, while others offer enough features to make any Getting Things Done devotee happy.

- **Calendar** - As with email, this feature means a full calendar client, not just an integration with Outlook or Google Calendar.

Specialties and What Set Them Apart

Law Practice Management Software (LPMS) products differ in the percentage of your office's tasks they handle in-app. That is to say, some products are all-in-one products with built in CRMs, accounting software, document management, etc. Others focus on integrating with additional products that your office may use. Neither approach is inherently correct, and most products will fall somewhere in the middle of the spectrum..
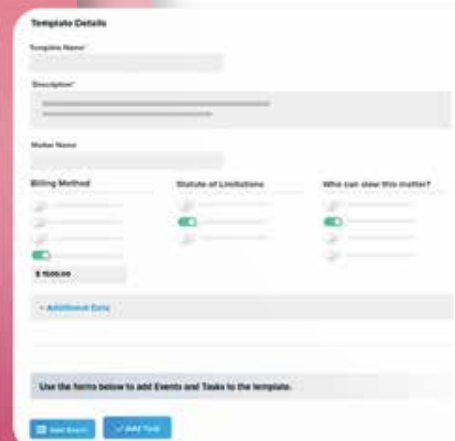
Additionally, most lawyers will find that the timekeeping, billing, and accounting features are important to them. Some products have hard-to-find features like split-billing and three-way reconciliation, while others make it easy to set-up and get going. Again, neither is inherently better than the other. Your office should assess its own needs.

Lastly, many LPMS providers incorporate task management of some kind into their products. These offerings can vary widely. All of the products will allow users to create and assign tasks to users. However, some will offer advanced features like workflow templates, kanban boards, and automations.

Important Features

- **Document Management** - Basic document management allows you to add documents to the system and associate them with your cases/matters.

- **Document Assembly** - Loading your firm's document templates into your law practice management software can save time and ensure consistency. This check means basic document assembly suitable for form letters, invoices, etc. For advanced document assembly, you'll probably need additional software.

- **Full Accounting** - Some software includes full double-entry accounting features, making additional accounting software unnecessary.

- **Online Payments** - Providers increasingly offer payment processing as an included or add-on feature, especially with cloud-based law practice management software.

- **Text Messaging** - Can you send and receive text messages and associate them with your matters?

CARET Legal

OVERVIEW

CARET Legal, formerly Zola Suite, is a cloud-based, mobile-friendly Law Practice Management Software (LPMS) platform with exceptional design and user experience. It features mobile apps, fully-integrated billing and accounting, two-way synced email, and robust document management capabilities.

BEST FOR:

Medium-sized firms look for a true all-in-one with strong task management.

True All-in-one | Strong Task Management | Document Management

Testimonial

"Zola Suite is a fantastic program! After almost 20 years of using the same practice management and billing software, we made the switch to Zola Suite and we couldn't be happier. It's saving us time that we didn't know we were wasting before."

PEGGYANN WOLLMAN
LaFountain & Wollman, P.C.

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Featured Product Update

Create Space in Your Day with CARET Legal Practice Management

Amy Reynolds, senior training specialist, walked Zack through CARET Legal's new and improved features. Aimed squarely at helping smaller and mid-sized firms be productive, these features include an enhanced user interface, robust tools, and the latest in client communications.

Read Full Article…

Clio Manage

Visit Site

OVERVIEW

Clio Manage is powerful, innovative, and user-friendly Law Practice Management Software (LPMS). It is a platform that welcomes, and encourages integration. This is one of its greatest strengths. Clio boasts an extensive App Directory, and an Open API. It works-and-plays well with an almost overwhelming amount of legal tech. Additionally, it's one part of the entire Clio Suite. Which means you can seamlessly add Clio Grow (an intake CRM), albeit for an additional price.

BEST FOR:

Firms wanting versatility, with options for integrations.

Cloud-based | Integrations | Customizability

Testimonial

"iLawyerMarketing has helped us create a law firm with a regular, steady, and dependable stream of quality personal injury clients. We are able to focus our efforts on providing high quality legal services to injured victims and their families, and leave the online marketing to the professionals at iLawyer."

KATY YOUNG
Partner, Ad Astra Law Group, LLP

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Featured Product Update

Clio Streamlines Connected Apps Experience for Users

As noted in a previous article, Clio has launched its embedded app program. This will allow select partners to integrate apps "in the tab of the matter." This is part of a continued effort to promote a positive user experience for Clio users within third-party partner platforms.

Read Full Article...

CosmoLex

OVERVIEW

CosmoLex is a cloud-based practice management software with a robust feature set that includes a full law-firm accounting package. It's accounting features mean you don't have to deal with migrating information to-and-from a general-purpose accounting software package like QuickBooks or Xero. And with the single-tier pricing, users get a lot of bank for their buck. If you're looking for a true all-in-one platform, you'll definitely want to learn more about CosmoLex through this review.

BEST FOR:

Firms that want robust accounting.

Advanced Trust Accounting | Timekeeping & Billing | True All-in-one

Testimonial

"I needed practice management software for billing and for tracking expenses. CosmoLex works great. It is extremely powerful software but user-friendly at the same time. CosmoLex keeps adding more features all of the time and I am satisfied with them...The customer service team has been very helpful. I'm glad I chose CosmoLex"

STACEY STRANATHAN
Stranathan Law

Featured Product Update

CosmoLex Extends its All-in-one with CosmoLex Websites

Every business needs a website. Unfortunately, many law firms lack one, or if they have one, it serves no purpose beyond being a digital business card. Most firms want more, but time and other commitments preclude it. Fortunately, CosmoLex Websites makes creating and updating a powerful business website simple.

[Read Full Article...]
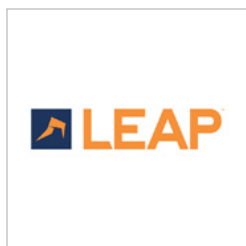
LEAP

OVERVIEW

LEAP legal software is a law practice management system focused on small to medium-sized law firms across the globe. It has a hybrid installation with both on-premises and cloud components. This allows it to benefit from the mobility of the Cloud, while still using the stability of a desktop solution. Law offices looking for a cloud solution with many of the on-premises features will want to take a look at our LEAP software review.

BEST FOR:

Firms looking for hybrid installation, with both on-premises and cloud components.

Strong Task Management | Document Automation | Billing & Timekeeping

Testimonial

"I've used various practice management software in the past... Nothing compared to LEAP. The automatic capture of time, extensive forms library, CRM system, and client portal are just a few of the features that have revolutionized the way we practice law. Our billable hours have increased 20% and our IT costs have gone down dramatically"

BILLY S.

Featured Product Update

LEAP Delivers Fully Integrated Experience with Office365 and Forms

As a hybrid law practice management solution, LEAP Legal Software exists in both the cloud and on a local device. This can certainly be an asset when working with documents. And LEAP definitely takes advantage of this with its document and form creation.

Read Full Article...

MyCase

OVERVIEW

MyCase is a good fit and a great value for firms looking for a full-featured, affordable Law Practice Management Software. It includes some features, like e-signatures and a full email client, that aren't easy to find built-in. Additionally, although the system is robust, it isn't overly complex. Project management and workflows are straightforward, accounting reports are easy to run, and internal communication is simple. For firms wanting most of their law office to work out of one application, MyCase is definitely worth a review.

BEST FOR:

Firms looking for a full-featured, robust LPMS that isn't complex.

Cloud-based | **Strong Task Management** | **Client Portal**

Testimonial

"With MyCase, an entire case file is in one place, particularly the billing and payments. Our clients love communicating with us, seeing calendar events, and paying their invoices — all from one location."

KRISTI ARONICA-MORGAN
Weitz Morgan, PLLC

Sponsored

Featured Product Update

MyCase Embeds LawPay to Extend ePayment Capabilities

As we noted in a previous article, LawPay (or more specifically, AffiniPay) recently purchased MyCase. This move says a lot about the direction of legal tech investment as a whole. And the implementation of this marriage speaks about the platforms' direction.

Read Full Article...
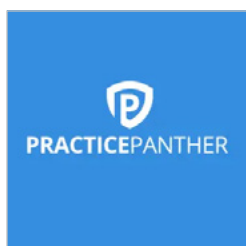
PracticePanther

OVERVIEW

PracticePanther is comprehensive Law Practice Management Software (LPMS). With it, one could easily move from potential client intake to closed and paid-in-full, without leaving the platform. It has select integrations with an emphasis on document storage (integrations vary by PracticePanther pricing tier). However, it does have an open API, integrates with Zapier, and connects directly to MailChimp. So, if you're looking to increase your efficiency without breaking the bank, PracticePanther is likely worth your review.

BEST FOR:

Small to mid-sized firms looking for a clean and easy-to-use dashboard.

Cloud-based | Intake | Customizability

Testimonial

"I honestly love the intuitive design and user-friendly search functions. It just makes matter management and billing an absolute breeze"

JACQUI JUBB
Business Attorney, JL Walker Law

Sponsored

Featured Product Update

PracticePanther Promotes Process Productivity with New Features

PracticePanther, the comprehensive law practice management solution focused on small to medium-sized law firms, spends a lot of time listening to its users. This ongoing conversation helps it refine and expand its features to serve its growing customer base better.

Read Full Article…

Rocket Matter

Visit Site

OVERVIEW

Rocket Matter is robust, productivity-focused law practice management software for solos and small firms. It has solid integrations, built-in project management, and top-of-the-line communications applications. As part of the ProfitSolv family, the Rocket Matter team is constantly reviewing the software for upgrades, enhancements, and additional integrations.

BEST FOR:

Small to medium-sized firms that want built-in project management or use Microsoft 365.

Integrations | Client Portal | Project Management

Testimonial

"Rocket Matter has been excellent for our firm and it allows us to maintain excellent billing practices while maintaining everything in an organized fashion. It is easy to enter billing details, add new clients, pull up client information, case information, and generate invoices."

PETER CRUICE
Sinsheimer & Associates

Sponsored

Featured Product Update

Rocket Matter Incorporates Kanban Project Management into LPMS

Rocket Matter brings an innovative tool from other industries into matter organization: the Kanban board. Kanban is a visual approach to project management that originated with Toyota engineer Taiichi Ohno in the late 1940s.

Read Full Article...

Law Practice Management Software

AbacusLaw

AbacusLaw is part of the CARET family of products. It is a hybrid law practice management platform that lives both locally and in the cloud. Users access it from their desktop and mobile applications.

Actionstep

Actionstep is cloud-based Law Practice Management Software (LPMS) for law firms with 1-50 users looking for an all-in-one product. Lawyers can use it to manage both front-of-house and back-of-house operations in one place. It covers everything from accounting and billing to email and document automation. Further, it has a highly organized document management system, workflow capabilities, and popular integrations.

Amicus Attorney

Amicus Attorney is a Law Practice Management Software (LPMS) platform that has been around for a long time. Along with AbacusLaw and Amicus Cloud, it is one of three LPMS products offered by Abacus Data Systems Canada, Inc. Although it can be cloud-based, it is not accessible through a browser. Which makes it a hybrid solution. As such, it is a local application (run directly on your computer, tablet, or phone) whose data can be stored at your office (on-premises), or in a private cloud.

Amicus Cloud

Amicus Cloud is a browser-based law practice management solution from Caret (formerly AbacusNext). It is a sister product of Zola Suite, AbacusLaw and Amicus Attorney. It is slightly scaled down when it comes to features, and is usually better for smaller firms that lack complexity.

Law Practice Management Software

CARET Legal

CARET Legal, formerly Zola Suite, is a cloud-based, mobile-friendly Law Practice Management Software (LPMS) platform with exceptional design and user experience. It features mobile apps, fully-integrated billing and accounting, two-way synced email, and robust document management capabilities.

CaseFleet

CaseFleet is a cloud-based law practice management platform built with litigators in mind. It's focused on evidence organization, document review, and fact management. Firms that are looking for a better way to handle investigations, depositions, and litigations will definitely want to review CaseFleet.

CASEpeer

CASEpeer is clearly meant for personal injury firms who are looking for robust, cloud-based Law Practice Management Software. It is built to be relatively plug-and-play for most firms. However, attorneys with systems and processes in place will likely find particular features, like settlement calculators, demand trackers, and other very specific Personal Injury reports, extremely helpful.

Centerbase

Centerbase is highly configurable, full-featured law practice management software for small- to medium-sized law firms. Among its features is advanced workflow automation that can be customized for your firm's needs. With all its features, Centerbase is probably overkill for most solos. It is best suited for firms of 5 lawyers or more that can take advantage of its advanced workflow automation features and are willing to invest time and money in training and implementation.

Law Practice Management Software

Clio Manage

Clio Manage is powerful, innovative, and user-friendly Law Practice Management Software (LPMS). It is a platform that welcomes, and encourages integration. This is one of its greatest strengths. Clio boasts an extensive App Directory, and an Open API. It works-and-plays well with an almost overwhelming amount of legal tech. Additionally, it's one part of the entire Clio Suite. Which means you can seamlessly add Clio Grow (an intake CRM), albeit for an additional price.

CosmoLex

CosmoLex is a cloud-based practice management software with a robust feature set that includes a full law-firm accounting package. It's accounting features mean you don't have to deal with migrating information to-and-from a general-purpose accounting software package like QuickBooks or Xero. And with the single-tier pricing, users get a lot of bank for their buck. If you're looking for a true all-in-one platform, you'll definitely want to learn more about CosmoLex through this review.

Filevine

Filevine law practice management software that emphasizes customizability. This makes it extremely versatile and customizable to each law firm's needs. It boasts client intake capabilities, matter management, document management, and in-depth workflow management.

Firm Central

Firm Central is straightforward small-firm law practice management software that is tightly integrated with Westlaw and several other Thomson Reuters products. Firm Central is really just meant for existing Westlaw customers. If you don't use Westlaw or other Thomson Reuters products, it's hard to recommend Firm Central.

Law Practice Management Software

Lawcus

Lawcus is intuitive, workflow-focused law practice management software that's especially useful for productivity focused law firms with well-defined systems and processes. It's an especially good fit for firms with a well-structured workflow for intake and case management.

LEAP

LEAP Legal Software is a legal practice productivity solution for law firms across the globe. It has a hybrid installation with both on-premises and cloud components. This allows it to benefit from the mobility of the Cloud, while still using the stability of a desktop solution. Law offices looking for a cloud law practice management solution with many of the on-premises features will want to take a look at our LEAP software review.

MerusCase

MerusCase is customizable, cloud-based law practice management software that's best for small to medium-sized litigation firms. However, it's probably not a good fit for firms looking to integrate third-party services.

MyCase

MyCase is a good fit and a great value for firms looking for a full-featured, affordable Law Practice Management Software. It includes some features, like e-signatures and a full email client, that aren't easy to find built-in. Additionally, although the system is robust, it isn't overly complex. Project management and workflows are straightforward, accounting reports are easy to run, and internal communication is simple. For firms wanting most of their law office to work out of one application, MyCase is definitely worth a review.

Law Practice Management Software

Document Management · Document Assembly · Full Accounting · Online Payments · Text Messaging

Neos

● ● ○ ● ●

Neos, powered by Assembly Software, is cloud-based case management software from the makers of Needles, and Trialworks. Although the company has been in the law practice management software game for quite some time, Neos is a relatively new player in the market.

PCLaw

● ● ● ○ ○

PCLaw is Lexis Nexis's turn at Law Practice Management Software (LPMS). It allows you to track matters, cases, time, and billing all in one place with a focus on making sure that you are getting paid for the time that you expend for a client.

PracticePanther

● ● ● ● ●

PracticePanther is comprehensive Law Practice Management Software (LPMS). With it, one could easily move from potential client intake to closed and paid-in-full, without leaving the platform. It has select integrations with an emphasis on document storage (integrations vary by PracticePanther pricing tier), and an open API. Firms looking to increase efficiency without breaking the bank should take a look at PracticePanther.

Rocket Matter

● ● ○ ● ○

Rocket Matter is a good fit for most small to medium-sized firms. However, practices that want built-in project management, and those who use Microsoft 365 will find the most benefit from the platform. Additionally, Rocket Matter makes it easy to grow with their application. Firms who are just starting out can easily use their Essentials tier for simple matter management.

Law Practice Management Software

Document Management · Document Assembly · Full Accounting · Online Payments · Text Messaging

SimpleLaw

SimpleLaw is a unique law practice management software that connects you with colleagues and clients. It offers the essentials of what you need for case and matter management with strategic integrations to help make your practice more efficient.

Smokeball

Smokeball is a hybrid desktop and cloud-based law practice management software for law firms who run on Windows. Its robust document and automation features are tightly integrated with Microsoft Word and Outlook.

Time Matters

Time Matters is a law practice management software solution from LexisNexis. It is a sibling product to PCLaw and LEAP Legal Software. As one of the stalwarts of the practice management solutions, many attorneys are familiar with it and have worked with it for years. However, it is generally considered legacy software. Parties interested in purchasing the software for the first time would likely do better to look at their sibling software, LEAP Legal Software.

Want to learn more?

LPMS products often try to be the hub of your legal tech stack. As such, they offer a lot of different features, integrations, and styles. Once you've honed in on what sort of product you need, head over to our Law Practice Management Software portal to learn more. There you'll find enhanced feature charts, user reviews, expert opinions, and more.

↗ Read Product Reviews

Document Management & Automation

Where to Begin with Document Management & Automation

Legal document automation products can range from simple form-fill products, like mail-merge, to complex computable documents that can change based on the needs of each client. You can use them internally for document creation workflows, or externally to gather information from your client.

Some Law Practice Management Software (LPMS) provide built-in document creation and management, but they are usually not as feature-rich as the stand-alone products like the ones listed below. Additionally, many of the products here are low or "no code," meaning that you don't have to have a computer science degree to use them.

In this Document Automation section, you can compare features, get additional details, and find the best application for your law firm.

How to Choose Legal Document Automation Products

As a lawyer, it's not always easy to find the right document automation software. We suggest you start your search by considering what sort of legal documents you want to automate. Then, think about what your system looks like after you incorporate the software into your existing legal tech stack. How does this software help your firm? The questions below should provide some guidance.

5 Steps for Choosing Law Firm Document Automation Software

1. Know Your Rights

First, know what you should expect from software with our [Legal Software Bill of Rights](#).

2. Determine Your Needs

Start by thinking about your end product. What sort of documents do you need to create? Be specific. Before you can make an informed decision about your legal document automation software, you need to know what you want to create. Understanding the "end product" goal will help you determine whether you simply need an add-on to Microsoft Word, something that integrates with your LPMS, or a stand-alone third-party system that provides high level functionality.

3. Assess your capabilities.

A lawyer's next consideration for their document automation software should be to determine what their coding ability is. Or whether they are willing to hire a third-party to set their system up. Although many products do not require any formal coding experience, some of them are closer to actual programming than others. You'll need to determine who will be setting up your system, and what their experience level is. It may be you. And the answer may be "none." Which is fine. Just choose accordingly.

4. Research your options.

With your requirements in hand, use the feature filters in the list below to narrow down your choices. Browse the product pages, read the community reviews, and narrow your choices to 1–3 likely options. Keep in mind what other software your application may need to integrate with. Do you want it to integrate with your LPMS? Will it create documents in a format you are familiar with? Where does it store the information it generates? Where does it get its information from?

5. Try before you buy.

Finally, sign up for a trial account with each of the likely options, put them through their paces, and select the one that will work best for your firm.

Stop typing (and retyping) the same information over and over again.

Automate your legal drafting and cut down the time you spend on paperwork by 80%.

Book a free demonstration at **lawyaw.com/time** to see what Lawyaw can do for your firm.

LAWYAW
part of ⊘ Clio

Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider essentials, specialization, important features, and what sets providers apart.

Essentials Every Provider Should Have

- **Document Templates** - The document management program creates reusable templates.

- **Document Automation** - Document automation (also called document assembly) software uses your document templates and information from a form or other source, like your law practice management software or CMS, to assemble documents for you.

- **Version Control** - This means the software provides information on document revisions and makes sure you are using the most recent version of a template.

- **Optical Character Recognition** - Optical Character Recognition means that scans of documents will be turned into searchable files.

Specialties and What Set Them Apart

Document management products usually vary in their level of searchability (think OCR), sophistication of shareability, and version control. Some users simply need a repository for their digital case files, while others need the ability to search and manage the contents of tens or thousands of documents at a time.

Document Automation products usually fall on a spectrum of sophistication versus ease of use. The more complex your document assembly requirements, usually, the more difficult it is to set up. Plug-and-play products will likely not allow for as much data manipulation, but they are usable much more quickly. Test the product. And, more importantly, determine what your use cases will be prior to purchasing.

Important Features

- **Guided Interviews** - The program can create a guided interview and then use the client's answers to automatically create a document.

- **Conditional Logic** - If the software uses conditional logic, this means that you can choose to have certain text in your assembled document included only under certain conditions.

- **Built-in E-Signing** - Some products will allow you to integrate with e-Signing platforms, ones with built-in eSignature have it integrated directly into the workflow of their product.

- **Court Forms** - Court Forms means the product comes with ready-made forms for you to use in specific court filings. Form sets could include USCIS, Bankruptcy, or even filings for your specific locality.

- **Calculations** - If this field is checked, it means the software can perform calculations based on numerical or text input.

Lawyaw

OVERVIEW

Lawyaw is a document assembly tool designed to help you create smart templates for your law practice. It has a user-friendly web-based platform, and comes with an MS Word add-in that connects directly to your online account. It is somewhat unique in the marketplace as a low-code application that allows you to retain most of MS Word's conditional formatting functionality. Our review of Lawyaw finds a reasonably priced platform that balances complexity and usability well.

BEST FOR:

Attorneys who want to create smart documents in an intuitive and easy-to-use way.

Ready-made Forms | MS Word Add-in | Low-Code

Testimonial

"We've been using Lawyaw for several years. The Lawyaw team is very responsive to requests and willing to adapt their software for users. We enjoy using all of the features (esign, forms, templates, etc.) and the price makes it a great deal for any small or solo attorney. I highly recommend adding Lawyaw to your tech stack at your firm."

SARA K.

Featured Product Update

Lawyaw Joins Clio and Bolsters Its Court Forms

In Late 2021, Clio, the Canadian-based Law Practice Management Software, bought the Document Automation Platform, Lawyaw. This increased Clio's document automation capabilities immensely. Lawyaw, in turn, has increased its offerings at a blistering pace. They've already added five states to their court form templates arsenal, with an equal amount on the way.

Read Full Article...
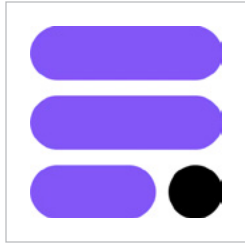
Gavel

OVERVIEW

Gavel (f/k/a Documate) is a document assembly & automation platform that allows you to create templates and forms to speed up your document creation. Attorneys can generate document sets for internal use and create intake forms for clients. Additionally, workflows—a series of automated actions—can be easily shared with colleagues. Use the following Gavel review of its features and pricing to determine if the platform is right for you.

BEST FOR:

Attorneys with no coding experience (or desire).

MS Word Add-in | Guided Interviews | White Labeling

Testimonial

"Gavel is infinitely powerful, but also super easy to use/set up. It can handle nested conditional logic and complex calculations. But what makes it stand out are the client-facing features. It's not just document automation – it allows lawyers to build expert systems, client intake that generates documents, and full-fledged client-facing products."

ERIN LEVINE
Hello Divorce and Levine Family Law

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Featured Product Update

Documate Improves Data Manager to Help Lawyers Build Powerful Automations

At this point, lawyers know that document automation is more than just merging form fields into a static document. It's also more than just conditional statements and formatting. Used thoughtfully, the apps or workflows created in Documate can gather a tremendous amount of information.

Read Full Article...

NetDocuments Visit Site

OVERVIEW

NetDocuments is a document management platform that lets you access your documents from anywhere, including mobile devices. It gives you a centralized repository so you can easily share documents with other members of your team and with clients. This type of software is a must-have for any remote, paperless practice.

BEST FOR:

Firms that need a robust and feature-rich document management solution.

Security | **Integrations** | **Version Control**

Testimonial

"We had two lawyers who used NetDocuments at previous firms who provided rave reviews, so between that and our due diligence against our goals and criteria, the decision to select NetDocuments was actually pretty easy."

DYLAN SNOWDON
Partner at Carbert Waite LLP

Sponsored

Featured Product Update

Data Tables Make PatternBuilder Even More Versatile

Scott Kelly, product manager at NetDocuments, sat down with Zack to discuss how PatternBuilder integrates with NetDocuments and to demonstrate a new customizable database feature called data tables.

Read Full Article...

Document Management & Automation

AXEL Go

AXEL Go is a file sharing app that allows users to collect, share, and store data in a secure way. Firms can keep their sensitive information in the cloud (which is a decentralized, encrypted, blockchain-based network), on-premises, or in a hybrid of both. They can send secure requests to clients asking them to upload documents directly into the secure AXEL system. And they can share data-sets with third parties in a controlled, secured manner.

Gavel

Gavel (f/k/a Documate) is a document assembly & automation platform that allows you to create templates and forms to speed up your document creation. Attorneys can generate document sets for internal use and create intake forms for clients. Additionally, workflows—a series of automated actions—can be easily shared with colleagues. Use the following Gavel review of its features and pricing to determine if the platform is right for you.

HotDocs

HotDocs is a document assembly solution that allows lawyers to increase their efficiency by automating the creation of routine documents. HotDocs turns your frequently-used documents, such as contracts and intake forms, into reusable templates. Thanks to a plugin, those templates can be created without leaving Microsoft Word.

Knackly

Knackly is a legal document automation platform with client-facing guided interview capabilities. It's powerful. At least, it can be. But it's not a "no-code" solution. It will definitely take some time to get set up (they help you with this through an initial "Jumpstart" program). But you can create beautiful automated documents.

Document Management & Automation

Guided Interviews · Conditional Logic · Built-in E-Signing · Court Forms · Calculations

Lawyaw

Lawyaw is a document assembly tool designed to help you create smart templates for your law practice. It has a user-friendly web-based platform, and comes with an MS Word add-in that connects directly to your online account. It is somewhat unique in the marketplace as a low-code application that allows you to retain most of MS Word's conditional formatting functionality. Our review of Lawyaw finds a reasonably priced platform that balances complexity and usability well.

LexWorkplace

LexWorkplace is document and email management software by Uptime Legal Systems. It is a cloud-based solution that enables law firms to store, organize and manage documents by client and matter. LexWorkplace works on Windows and Mac OS, and handles document sharing, version control, full-text search, email management/Outlook integration and more.

NetDocuments

NetDocuments is a document management platform that lets you access your documents from anywhere, including mobile devices. It gives you a centralized repository so you can easily share documents with other members of your team and with clients. This type of software is a must-have for any remote, paperless practice.

PatternBuilder

PatternBuilder is a NetDocuments-centric template and process automation tool promising a "no code" approach to automation. It offers robust tools and can slipstream into legal process automation and document e-signing procedures. However, one must subscribe to NetDocuments to access PatternBuilder. While some firms buy NetDocuments expressly to use PatternBuilder, firms using another document management system, or none, must weigh the cost of NetDocuments plus PatternBuilder when seeking an automation and workflow technology.

Want to learn more?

Document Management and Automation products provide very different solutions to different law offices. On one hand, the product could provide a secure way to share documents. On the other, it could help your office build automated internal processes. After you've determined which direction you want to go, head over to our Document Management and Automation portal to learn more. There you'll find enhanced feature charts, user reviews, expert opinions, and more.
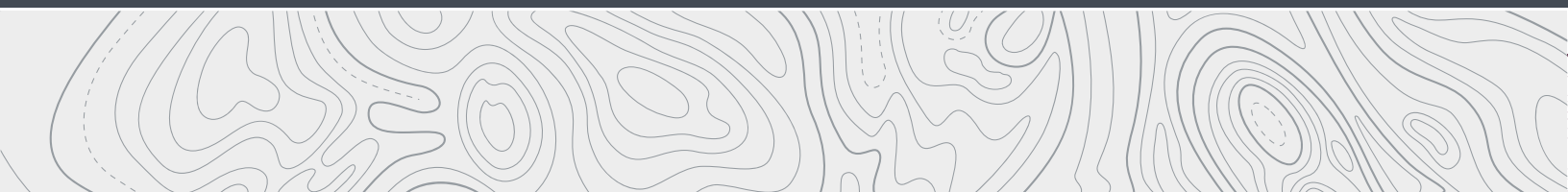
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Office Management

Discover tools to help you attract and engage clients.

Your business can't succeed unless back-office functions happen seamlessly and correctly. A modern firm needs efficient processes, modern infrastructure, and effective staff to remain healthy. From setting up a remote office, to billing and finances, here, you'll find tools to help you run your law firm like a business.

Accounting, Billing & Finance

Like it or not, a law practice, at its core, is a business. And businesses of all shapes and sizes need to perform general bookkeeping functions and track their finances. The easiest way to do this is to use law firm accounting software. Although it may seem like an unnecessary expense to some practitioners, this is not typically something your office can afford to go without.

Virtual Receptionists & Outsourced Staffing

Virtual receptionists and chat services are popular with solo and small law firms that want to be responsive but don't want to hire a full-time employee or intake specialist. They can also be an effective way to handle overflow when nobody at the firm can answer.

Accounting, Billing & Finance

Where to Begin with Accounting, Billing & Finance

As with any new application you implement in your practice, it may take some time initially to get your accounting, billing, and finance system running seamlessly. Fortunately, many of these options, like QuickBooks, have robust support and documentation, to help you get started. However, having your system set-up by a professional is not uncommon. Either way, it's important to take time on the front end to set up your system correctly.

How to Choose Accounting, Billing & Finance Software

The following information should help you determine what type of software is best for your practice. Keep in mind, however, that some Law Practice Management Software (LPMS) provides full accounting within their systems. For those of you just starting out, or on a budget, it may be worth looking into whether your LPMS already has that function.

When choosing law firm accounting software, knowing which specific features you need to keep your business running smoothly can be challenging. We'll try to make it easy.

4 Steps for Choosing Law Firm Accounting Software

1. **Determine your law firm's accounting software needs.**
Some programs offer only accounting features, while others allow you to accept credit card payments online, manage your payroll, and more.

2. **Assess the available features.**
Read through our feature definitions list. Here, you will find the typical offerings of law firm accounting software and be able to compare the features of each.

3. Research your options.

Then, get more information about the software that most interests you by visiting the product page for each.

4. Try before you buy.

Finally, sign up for a trial account with one or two likely software options, put them through their paces, and select the one that will work best for your firm.

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by ⌄profitsolv

Best Usability
FALL
2023

Easy Time and Billing With TimeSolv

Voted the #1 legal billing software for usability

- Easily track time and expenses on the go

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- Improve visibility into your bottom line with matter budgets

- Make informed business decisions with easy-to-read reports

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Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider the essentials every provider should have, specializations and things that set them apart from each other, and important features to consider as part of your decision.

Essentials Every Provider Should Have

- **Invoicing** - Does the provider allow you to create and send invoices to your clients?

- **Expense Tracking** - Does the product allow your office to track the monies you spend on a client's file?

- **Reporting** - This is a question of whether the provider allows you to run basic business reports. Some will be built-in, while others will allow for vast customization.

- **Online Payments** - This means the ability to accept credit card or echeck payments within your accounting software, either through its own payment portal or via a third-party integration like PayPal or Square. Most online payments involve a separate processing fee.

Specialties and What Set Them Apart

Accounting, Billing & Finance products usually vary in what they manage. Some of the products in this category will handle your business accounting, including your accounts receivable and general ledger. Others will specialize in timekeeping and billing functions like split-billing, AI powered timekeeping, and client payment portals.

It is unusual for one product to handle everything in this category, so integrations are important. Both the amount of integrations a product provides and the depth of the integrations are significant. Be thoughtful of what products you will want to share data between as this will inform the level of reporting you can run.

Important Features

- **Recurring Payments** - Some providers will allow you to set up recurring payments for your clients that will be automatically debited based on selections your clients make.

- **User Management** - User Management means the software allows your firm to differentiate between persons who have access to the information and adjust their levels of access based on their relevant users' statuses.

- **Split Origination Reporting** - This means that the product allows your firm to track where a file came from and allocate a percentage of the origination to individual users.

- **Basic Bookkeeping** - This means simple double-entry bookkeeping.

- **Trust Account Management** - This means the product allows you to differentiate between client trust accounts and track them individually. It also means that the product helps you manage your three-way reconciliation.

LawPay

OVERVIEW

LawPay is a credit card processor built specifically for law firms. It brings full trust-account compliance to a huge list of integration partners. Whatever software you currently use to send invoices and trust requests can probably be integrated with a few clicks. With very little effort, you can start accepting credit card payments from your clients.

BEST FOR:

Firms wanting a credit card processor designed specifically for law firms and integrates with current products.

Integrations | Recurring Payments | A/R Management

Testimonial

"LawPay understands the regulations and ethical rules that apply to lawyers... the service is very easy to setup and use, we were up and running on the same day."

MATTHEW B.

Featured Product Update

Track and Bill Time with New LawPay Pro

It's easy to assume that a company we've known for years does only that thing we first knew them for. Attorneys know LawPay as the preeminent payment processor for law firms. LawPay is expanding its offerings to include invoicing, trust accounting, time tracking, and expense tracking.

Read Full Article…

TimeSolv

OVERVIEW

TimeSolv is a cloud-based timekeeping and billing platform for law firms. It is generally more robust than accounting platforms built-into Law Practice Management Software (LPMS). And it is typically more convenient than local timekeeping software.

BEST FOR:

Firms that need enhanced timekeeping and billing capabilities.

ePayments | Payment Reminders | Easy Migrations

Testimonial

"Must-Have for any Legal Services Firm. Awesome product. Has allowed us to catch missed time! User friendly and customizable! Also has a compatible app that allows for entry on the road. The reporting is real-time and allowed me to monitor revenue daily. Highly recommended."

BRIAN B.
CEO/President

Sponsored

Featured Product Update

TimeSolv Expands Reach with Growing Integrations

TimeSolv provides real, workable integrations with document management, payment, email, and accounting platforms commonly found in legal tech stacks. This time tracking and billing software goes beyond the basics. It offers a host of noteworthy features to seamlessly share data, help improve client experience, easily track matters, and more.

Read Full Article...

Accounting, Billing, & Finance

Bill4Time

○ ○ ○ ○ ○

Bill4Time is a timekeeping and billing platform with basic client, and matter management built-in. Think of it as a billing system that tracks jobs and expenses. It is good at that. As such, it has extensive reporting capabilities, collaborative task management, and advanced billing workflows.

LawPay

● ○ ○ ○ ○

LawPay is a credit card processor built specifically for law firms. It brings full trust-account compliance to a huge list of integration partners. Whatever software you currently use to send invoices and trust requests can probably be integrated with a few clicks. With very little effort, you can start accepting credit card payments from your clients.

Nota

○ ● ○ ○ ●

Nota is a trust account manager that runs directly out of the user's IOLTA account. It is provided gratis to any M&T Banking customer with an IOLTA account. It can integrate directly into your QuickBooks Online account, although, the real power comes from not needing to do this. Users write checks directly from the application, and track individual client trust accounts from within the system.

Accounting, Billing, & Finance

Tabs3 Billing

⬤ ◯ ⬤ ◯ ⬤

Tabs3 Billing is a timekeeping and billing platform within the ProfitSolv family. It is an on-premises solution with options for remote access from the web. It has robust time tracking features and many hard-to-find options like split origination reporting. It's best for lawyers with a physical office who can't compromise on timekeeping features.

TimeSolv

⬤ ◯ ⬤ ⬤ ⬤

TimeSolv is a cloud-based timekeeping and billing platform for law firms. It is generally more robust than accounting platforms built-into Law Practice Management Software (LPMS). And it is typically more convenient than local timekeeping software.

Want to learn more?

Accounting, Billing & Finance products can be incorporated into your legal tech stack in many different ways. They may be an add-on product that helps you accept online payments, or it may be full accounting software. Once you've focused your search, head over to our Accounting, Billing & Finance portal to learn more. There you'll find enhanced feature charts, user reviews, expert opinions, and more.

↗ Read Product Reviews

Virtual Receptionists & Outsourced Staffing

Where to Begin with Virtual Receptionists & Outsourced Staffing

With virtual reception and outsourced staffing, start from the outside looking in. What do your clients expect? What does the end product need to look like? All too often, firms search for providers with an eye toward who will help them the most. The question, really, is who will help your clients the most.

This requires an attorney to have an idea of what their client (or potential client) wants. Sometimes they want instant answers—which may lead toward an online chatbot. While other times, clients may want concierge service. In these cases, they may not need immediate answers, they just want to feel connected to your office.

How to Choose a Virtual Receptionist

1. Determine if you need a dedicated team of receptionists.
Some companies distribute incoming calls among dozens or hundreds of receptionists. When someone answers, they will get a script with your custom greeting and (probably) a pronunciation guide, but they won't get to know your firm. Other companies assign your firm a small team and work with you to train them on call handling. Of course, this may also have implications for price and availability.

2. Assess what availability you need.
It's tempting to assume 24/7/365 is better, but there may be trade-offs. For example, some companies use local receptionists during regular business hours, but remote call centers in other time zones for overnight shifts. If you prefer a small, dedicated team, it may not be possible to get 24/7/365 without increasing the team size or using additional receptionists after hours. And 24/7/365 is often (but not always) more expensive, too.

3. What do you need besides just reception?

You can get a virtual receptionist just for answering the phone, but many offer additional services like appointment scheduling and confirmation, client intake, live chat, or even taking payments and getting retainer agreements signed. Some services may cost you more than just the additional minutes.

4. How do you want to pay?

Most virtual receptionists charge by the minute, but you can find those that charge by the call or offer unlimited or customized plans. Depending on the kinds of calls your firm tends to get, certain plans might better fit your firm's needs.

5. Compare Offerings.

Once you have an idea of your firm's needs, use the feature filters below to see which companies can meet those needs. Then visit their product pages to learn more about what firms are in their target demographic, pricing, and other things you might want to know. Narrow the options to two or three that you are considering, read the reviews from our community, and pick one to try.

How to Choose a Chat Service

Chat services fall into one of three categories: live chat, chat tools, and chatbots (see the descriptions below). In selecting a chat service, the primary consideration is who you want to respond to visitors who want to chat:

- **Live chat** - This is much like a virtual receptionist, in which case many of the considerations above apply.

- **Chat tool** - Where you or someone from your firm responds.

- **Chatbot** - A decision tree you design, possibly with help from AI.

Once you have narrowed your chat service options, it should be relatively easy to test them. Reach out to the companies you are considering and ask them for a few of their customers' websites to visit to see how they work. You should also get a demo or trial of any chat tools you will be using or any chatbot you must configure or help configure.

Comparing Providers

When determining which product provides the most value to your firm and offers solutions to the problems you're trying to solve, it's important to make comparisons. Consider the essentials every provider should have, specializations and things that set them apart from each other, and important features to consider as part of your decision.

Essentials Every Provider Should Have

- **Client Intake** - A virtual receptionist service can be a partner in your intake process rather than only asking questions and gathering information according to your intake script.

- **Appointment Scheduling** - You can give your receptionist access to your calendar or scheduler so they can book appointments for you.

- **Call Routing** - With call routing you can direct incoming calls based on criteria you set. For example, you could send existing clients directly to the lawyer handling their matter. Or distribute potential client calls evenly among intake staff. Or just send calls to your virtual receptionist after hours.

- **Text Messaging** - Send and receive text messages using your business phone system.

Specialties and What Set Them Apart

Virtual Receptionist services typically vary in level of service. And you typically get what you pay for. While some firms will need a service that sounds as if they are an integrated part of the team, others need high-volume services that can be turned on or off at a moment's notice. Most of the time, you get out what you put in. Good planning makes for good intake procedures.

Chat tools usually vary by level of automation. Some simply connect someone in your office to the chat tool so you can talk to visitors on your website. Others, however, have decision trees and artificial intelligence that direct the user to the appropriate information. Assess what sort of users you plan to have before testing out chat products.

Even More Accessible.

Tabs3 Software now offers Tabs3 Billing and Financials in Tabs3 Cloud, accessible from any internet browser. Enjoy powerful and flexible features like easy invoice creation, report generation, matter management, payment collection, and more, without compromising client confidentiality. No servers or additional hardware are needed.

Learn More: Tabs3.com/Cloud

Important Features

- **Live Receptionist** - Although they are called "virtual" receptionists, the person who answers the phone is, in fact, a real person who can use your customized greeting, request information according to your instructions, make warm transfers to you, or take messages.

- **Live Chat** - We're using live chat to mean chat plus a team to respond to inquiries, as opposed to a chat tool you can use to respond yourself.

- **Call Recording** - "This call may be recorded for quality control purposes." Only if you want to, of course.

- **Call Analytics** - Use information about your calls to identify patterns, calculate the ROI of your marketing efforts, and improve your client service.

- **Outbound Calls** - Some virtual receptionist services will make calls for you to relay basic information such as confirming an appointment, providing directions to your office, or making referrals.

LAWYERLINE
POWERED BY LAWYER.COM

LawyerLine

OVERVIEW

Our review of LawyerLine finds it is a virtual receptionist service exclusively for lawyers. Their intake specialists are trained to use the law firm's scripts to receive phone calls, schedule appointments, and even make outbound calls to potential new clients. Their tiered pricing system, based on type of service, rather than amount of service, is easy to understand and reasonably priced.

BEST FOR:

Lawyers and firms who want a white-glove experience with straight-forward pricing.

Warm Transfer	Multi-lingual	24/7/365

Testimonial

"I'm a partner at the law firm of Fennemore Craig, an AM Law 200 firm, where I've practiced personal injury for the last 31 years. To say that we've been happy is an understatement. They have exceeded our expectations, in terms of quality of service, customer service, responsiveness and communication. I feel like we have found a real business partner rather than a third party vendor."

MARC LAMBER
Fennemore Craig

Additional Details

Exclusively for Legal

The receptionists staffing the phones are experienced legal industry professionals. All previously worked as paralegals, in-house law firm client screeners, or in other industry roles.

LEX Reception

OVERVIEW

LEX Reception offers virtual receptionists service catering specifically to lawyers. They integrate with many of the major cloud-based Client Resource Managers, and Law Practice Management Software providers. Their live chat, and basic phone services are available 24/7/365, and they even have their own video conferencing service.

BEST FOR:

Solo to medium sized firms looking for CRM or LPMS integrations.

Administrative Services | Easy Setup | Multi-lingual Management

Testimonial

"I just signed up with LEX and am extremely impressed with the onboarding experience. My contact person made the process very easy for me which I appreciated being totally overwhelmed with work. I look forward to benefitting from their services."

LOREN R.

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Featured Product Update

LEX Reception Integrations Automate Client Intake

LEX Reception is a virtual receptionist service specifically designed for lawyers. They are available 24/7/365, have bilingual services, and can make outbound calls on your behalf. What sets them apart from some other virtual receptionist services, however, is how they fit into your law firm's legal tech stack.

Read Full Article...

Posh Virtual Receptionists

Visit Site

OVERVIEW

Posh Virtual Receptionists offers 24/7/365 answering service for small to medium-sized law firms across the Country. Their bi-lingual answering service can route calls, forward messages (via text, email, or their app), qualify potential new clients (PNCs), and even make outbound calls based on intake forms on your website. They can use your existing business number, or you can be assigned a new one. You can even make outbound business text messages.

BEST FOR:

Mid-sized firms needing Spanish speakers.

Warm Transfer | **Live Chat** | **Multi-lingual**

Testimonial

"I have had a very good experience using POSH. I have a small office, so having a virtual receptionist has been great. It also helps a lot when we are short-handed and they can take overflow messages. They have been very professional in answering the phone, screening calls and making transfers as requested. I highly recommend them!"

ROXANNE HUMMEL

Sponsored

Featured Product Update

Posh Mobile App Makes Virtual Reception Simple

Posh Virtual Receptionists provides concierge-level answering services to law firm clients. They handle outgoing calls, messaging, and appointment scheduling. With their mobile app, they bring that, and more, into the palm of a lawyer's hand.

Read Full Article...

Virtual Receptionists & Outsourced Staffing

Abby Connect

Abby Connect is a live virtual receptionist service for small businesses. They have extensive experience with the legal field and offer bi-lingual services with custom answering hours. They have an open API, and connect directly with Clio Grow, Clio Manage, Hubspot, Lawmatics, and Zapier.

Alert Communications

Alert Communications is a virtual receptionist provider exclusively for the legal field. They have major capacity, offer bi-lingual (Spanish only) services at no extra cost, and have extensive customizability. With their services, a law firm can scale up and down as the case-load and marketing campaigns require.

Back Office Betties

Back Office Betties is a Virtual Receptionist and Virtual Assistant company focused specifically on the legal field. They offer bi-lingual services, webchat, and integrate with many of the most common CRMs and LPMSs. If you are a solo or small firm who wants personalized service, Back Office Betties may be worth your review.

Get Staffed Up

Get Staffed Up is a legal industry specific virtual assistant staffing service. Their services range from administrative assistant to marketing assistant, including intake coordinators and more. They hire mainly from South America and South Africa, and focus on hiring staffers with excellent English who can handle client-facing positions.

Virtual Receptionists & Outsourced Staffing

LawDroid

LawDroid builds and manages custom chatbots for law firms, especially those with high-volume, website-based intake needs. It's a good fit if your marketing strategy is centered around your website, because a chatbot can help guide potential clients through your intake process and answer questions they may have.

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LEX Reception

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Nexa

Because it uses Zapier to integrate with customer relationship management (CRM) software, law practice management software Clio, legal-specific CRM Lexicata, and hundreds of other programs, Nexa is an especially good fit for attorneys looking to streamline and connect their technology services.

Virtual Receptionists & Outsourced Staffing

Ngage Live Chat

As the name suggests, Ngage Live Chat is strictly a live chat platform. It is part of the Martindale Hubbell suite of products. So it integrates with Lawyers.com and Avvo.com. Additionally, it will integrate with your Facebook page, and any website you want to install it on. All of this allows potential clients to engage with your firm from a variety of sources at any time of the day.

PATLive

PATLive is an experienced call center with 30 years of experience and a proprietary scripting software for customized call handling. It's one choice for a virtual receptionist for your law firm.

Posh Virtual Receptionists

Posh Virtual Receptionists offers 24/7/365 answering service for small to medium-sized law firms across the Country. Their bi-lingual answering service can route calls, forward messages (via text, email, or their app), qualify potential new clients (PNCs), and even make outbound calls based on intake forms on your website. They can use your existing business number, or you can be assigned a new one. You can even make outbound business text messages.

Ruby

Ruby (formerly Ruby Receptionists) led the way in introducing virtual receptionists to small law firms. Our review finds they offer friendly, professional, receptionists with customized call scripts, appointment scheduling, and more. Their 24/7 live-chat feature allows firms to create an additional intake-channel on their website.

Virtual Receptionists & Outsourced Staffing

<div style="writing-mode: vertical">Live Receptionist</div>
<div style="writing-mode: vertical">Live Chat</div>
<div style="writing-mode: vertical">Call Recording</div>
<div style="writing-mode: vertical">Call Analytics</div>
<div style="writing-mode: vertical">Outbound Calls</div>

Smith.ai

If you are looking for a virtual receptionist service for your small to medium-sized law firm, then Smith.ai is likely worth a review. They combine virtual receptionists, live chat, and basic phone services for small law firms with per-call (instead of per-minute) pricing. This is all backed by Artificial Intelligence (AI) and is available 24/7/365.

Want to learn more?

Virtual Reception providers offer a range of different services based on a law firm's needs. Once you've determined what type of partner you're interested in, you can find more information in the Virtual Receptionist product reviews on our website. There, you'll find an enhanced features chart, user reviews, expert analysis, and more.

↗ Read Product Reviews

Take the Next Step in Building Your Legal Tech Stack

Discovering the right products and solutions for your firm can help you generate the right leads, automate processes, manage case information effectively, increase productivity, improve communication, and provide a great experience for your client from start to finish.

Now that you're equipped with the right questions to ask, know what features to consider, and have the information at your fingertips, you have what you need to take the next step toward implementation. Remember, don't try to implement everything at once. Identify the biggest need, the best solution available, and take the next step.

Learn more about specific products and services in this guide by visiting our **Product Reviews**.

Lawyerist