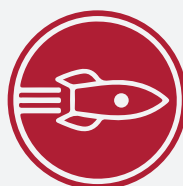


Case Management Buyers Guide: **How to Pick the Right Program for Your Law Firm**



rocket matter[®]

Welcome!

Because you've downloaded this guide, it's obvious that you're ready to take your case management capabilities to the next level.

As the first online practice management software built just for lawyers, Rocket Matter knows a thing or two about the challenges attorneys and other legal professionals face when it comes to case management.



Whether you want to organize documents, provide remote accessibility, or simplify your timekeeping processes, this practical, hands-on guide to implementing a new case management program can help you make it happen.

If there's anything we've learned in the last 15 years, it's that every law firm is unique.

Our mission has been to simplify the administrative side of practicing law since 2007, but we know there's no such thing as a one-size-fits-all solution that will meet every need of every practice.

We've spent years collaborating with solo, small, and mid-sized firms on the best ways to improve practice and case management tools, and our goal in creating this guide is to help you find the solutions that let you focus on your clients. As you read, we hope you'll find the answers, and maybe even new questions, that help you do just that.

So take a deep breath, grab a pen and paper, and let's talk case management!



Write your own how-to guide

The only person who can tell you which case management software is right for you is you.

The first step in choosing a new platform is to sit down with your team—and we mean your *whole* team—and identify where the bottlenecks are in your current processes. Who will be using the new program? Is there something you need that your system doesn't offer? Does your platform work as well for associates as it does for admins?

Getting input from your team is critical for a couple of reasons. First, you can't solve problems you don't know exist. Second, better data drives better decisions. And finally, bringing your whole team into the selection process makes it more likely that they'll be receptive to making the shift. (And let's be honest, it can be a big disruption to change software and learn new systems.)

Questions to ask along the way

Once you know what your team needs to be successful, it's much easier to compare programs. Here are seven questions to guide your journey:

1. Would your firm work better on a cloud- or server-based system?
2. Can everyone on your team use the program easily?
3. Does it provide adequate cybersecurity options?
4. Do they offer extensive customer support?
5. How customizable is the program?
6. Can it integrate with your other programs?
7. What's the expected return on investment?



If you want to ensure the implementation is successful, make sure you give yourself time to ask and answer these questions. Even if you don't find a program that satisfies every single one of your law firm's needs, knowing the answers ahead of time will ensure that you know what you're getting into.

Cloud vs. server-based programs

Law firm case management software comes in two basic forms:



A **cloud-based solution** is hosted on a remote server, making the program accessible anywhere on any device (laptop, phone, desktop) as long as there's a WiFi connection.



A **server-based solution**, also known as an on-premises solution, refers to software housed on on-site hardware dedicated to managing network resources.

When server-based software was first introduced, it was a business game-changer. But as technology has advanced, this traditional software model has proven to deliver fewer capabilities and be less agile than cloud computing.

While cloud solutions aren't always the answer, they usually provide valuable advantages, including:

- Remote accessibility
- Automatic upgrades managed by the provider (i.e. not you)
- Automatic file backup and disaster recovery support
- Improved collaboration functions
- Enhanced cybersecurity protections
- Multiple integrations with other programs in a single interface

Additionally, cloud-based software solutions for legal case management are much more affordable than you might think, especially when you take into account that you'll have lower hardware and maintenance costs in your office.

Ease of use

Any software worth its salt will have a trial period that lets your team test it out. During this exploratory time, talk with your team about whether the software is actually easy to use when performing daily tasks, including:

- Tracking time
- Searching for documents
- Adding new information to case matters
- Switching between programs
- Creating and sending invoices

If the interface isn't intuitive, or if switching between tasks isn't efficient—and efficient for **everyone** who will need to use it—the program might not be the right fit for you.



Cybersecurity options

As a lawyer, you know better than anyone how important confidentiality is. Almost all case management software will have some security features, but not all security features are created equal.

Make sure the program you choose has a robust security infrastructure with options for:

- Data encryption
- Secure file sharing
- Role-based access permissions
- Two-factor authentication
- Password management
- Secure web browsing



Additionally, ask about how the software company manages its own security. Do they perform risk assessments to identify vulnerabilities in their product? Do they have multiple servers with enough bandwidth to both halt cyberattacks and provide reliable uptime? What's their response plan in the event of a breach?

You don't have to be a cybersecurity expert to pick a secure case management software, but answers to these questions will help you find a program that's safe and secure.



Customer support

Whether you need to train your team on new processes, need help customizing templates or interfaces, or have a bug you can't resolve, you deserve a support team that values your time as much as you do.

(After all, time is a law firm's most valuable resource.)

To determine what issue resolution processes will look like, you need to know:

- If there's a dedicated support team or if you'll be working with sales/general employees
- What support channels are available (phone, chat, email, on-site, etc.)
- When support is available, including if there are options for after-hours, weekends, holidays, etc.

Even the best software program in the world won't be worth the money if you don't have a skilled team helping you use it at optimal levels.

Customization

We've already told you that there's no one-size-fits-all solution for case management—and we meant it.

The best case management software will have robust native capabilities but will also support customization that allows it to grow and change with your firm.

There are best practices for managing cases, but they're intended to be guiding principles, not a rigid workflow. Every lawyer, paralegal, and admin can implement those best practices

in unique ways that fit with their work style and practice area. It's usually much more productive and efficient to adapt a software's functions to these differences than to try to rewire people to match a program.

This doesn't mean, however, that you should dismiss a case management software out of hand if it doesn't align with existing workflows. Testing both existing processes and customizations is the best way to know if the program will work for you.

Integrations

Let's be honest, there's no reason to reinvent the case management wheel.

If popular platforms like NetDocuments, QuickBooks, Outlook, Google Calendar, LawToolBox, Evernote, or ScanSnap work for you, look for case management software programs that provide seamless integrations in a single interface.

Not only will this simplify and speed your transition, but it will also improve adoption among your team.



Return on investment

“How much more expensive is this program than what we already have?”

That’s a pretty standard question we hear from firms interested in purchasing a new case management software. But it’s not quite the right question.

Instead, ask “What kind of ROI can we expect?”

A new case management software might be more expensive than your legacy program, but it can also increase productivity, reduce your cycle time, or allow you to take on more clients. All of those results will probably bring in more than enough revenue to make up for the added cost.



Wrap-Up: Dos and don'ts for purchasing case management software

Do give yourself enough time to find the right solution.

Do involve your whole team (lawyers and admin staff) in the exploratory and testing phases.

Do take full advantage of training and customer support options, especially during testing.

DON'T be afraid to ask a lot of questions.

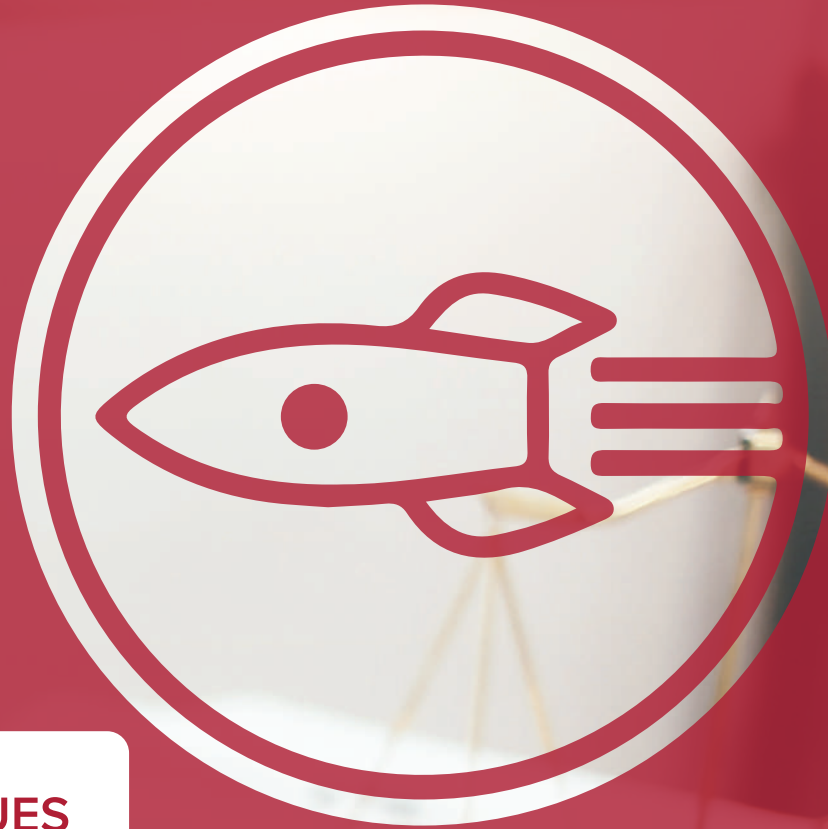
DON'T let price be the deciding factor in your purchase.

DON'T forget to ask for reviews and referrals.



Rocket Matter's case management capabilities

Rocket Matter's mission is simple: we want to make the lives of busy, mobile attorneys a whole lot easier. Our core values motivate every decision we make.



ROCKET MATTER CORE VALUES

- Embrace continuous improvement.
- Row in one direction.
- Come up with options and recommended solutions, not problems.
- Foster a positive and caring working environment.
- Be accountable.

Guided by our amazing community of users, we're continuously upgrading what we have to offer. Our case management solutions include:

- Matter dashboards
- Real-time updates
- Budget tracking
- File organization and sharing
- Document management
- Time tracking
- Integrations

And that's just the beginning.

Rocket Matter also delivers powerful business intelligence and reporting tools that can help you improve every single aspect of your practice management.

Schedule a Demo or start your **Free 15-Day Trial** today
to start improving how you run your practice.