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PRACTICE MANAGEMENT BY PRACTICE AREA

SPECIAL REPORT

Practice Management by Practice Area Special Report
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About

The Practice Management by Practice Area Special Report is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

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Welcome to Legal Tech Publishing's Practice Management by Practice Area Special Report

By: Cathy Kenton and Brian Dalton



Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

Welcome to the latest installment of the Legal Tech Publishing Buyer's Guide series: **Practice Management by Practice Area.**

Practice management software is the backbone of your firm. So, we're helping you ensure it's well adapted to your areas of focus.

Building on our previous **Practice Management Buyer's Guide**, we're pleased to offer this primer on how the latest software can help you succeed in a variety of practice areas.

All of the companies featured in this volume are dedicated to helping lawyers and legal professionals deliver high-quality professional services to their clients

In addition to the Special Report, you'll also find the latest category content, a product directory, and the ATL Non-Eventcast podcast series that has already garnered more than 2,500 downloads on the accompanying Above the Law landing page.

A special 'Thank You' to the Legal Tech Publishing team of writers, editors, project managers, and graphic designers. Without them, this industry-leading review series wouldn't be possible.



Brian Dalton, SVP, Breaking Media

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

cloudlex

Purposefully Built to Help Plaintiff Personal Injury Firms Build, Manage, and Grow Their Business

> **CloudLex offers a range of features to help law firms manage their cases more efficiently, including quick links to move swiftly between events, tasks, contacts, notes, and photos, and a global sidebar offering speedy access to searching, text messaging-like connection to clients and staff, notes, and emails.”**

Company Name Brand
CloudLex

Product Name Brand(s)
CloudLex, Lexvia

Latest Developments and Updates

- CloudLex’s PDF Editor allows teams to edit uploaded PDF files directly without ever leaving the Legal Cloud©. This seamless feature enables users to add or edit text, apply highlights, attach files, insert images, bates stamp, collaborate through comments, and more.
- Elevate your personal injury firm’s efficiency with LexSign by CloudLex, delivering the convenience of easily sending, signing, storing, and tracking e-signatures inside your legal software. Deal with fewer vendors, eliminate errors, and ensure convenience throughout the document signing process.
- Quickly assess caseload and the firm’s progress with the custom report builder. Get a comprehensive view of the firm’s activity and generate reports on any assigned matter.

Assisting Personal Injury Firms
CloudLex is legal case management software designed to **help personal injury law firms manage their cases more efficiently**, with key features such as a Settlement Calculator and Uber for Attorneys. The user-friendly cloud-based software facilitates uploading documents to organize them in folders, is easily accessible through a mobile app, and is highly reliable and intuitive. CloudLex is usable out-of-the-box, minimizing the need for extensive training. The platform handles a case from initial lead consideration through conversion to a matter, and streamlined workflows include task, document, and expense management. CloudLex offers a range of features to help law firms manage their cases more efficiently, including quick links

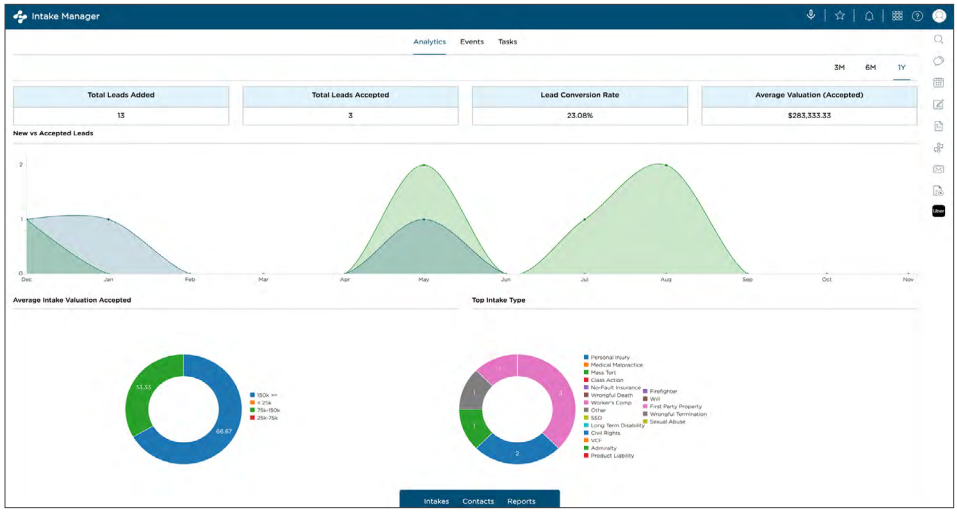


Figure 1: The Matter Intake Dashboard is an informative landing page showing key information like number of leads added and accepted, as well as the conversion rate and average valuation of leads accepted. There are graphics for quick reference and navigational options across the top and in the blue bar at the bottom of the screen. Use the right-side global sidebar to start an activity, such as a search or composing an email or note.

> **Clients can enter as much or as little data as they have, enhancing transparency, communication, and convenience for both parties. Information can be easily converted and assets collected during intake to create an active matter in just one click, eliminating the need for paper and manual data re-entry."**

to move swiftly between events, tasks, contacts, notes, and photos, and a global sidebar offering speedy access to searching, text messaging-like connection to clients and staff, notes, and emails.

Intelligent Client Intake Software
CloudLex Intake Manager helps personal injury law firms streamline their intake process, convert more leads into clients, and manage the intake workflow seamlessly. A firm can provide a convenient and tech-savvy client experience by sharing intake questionnaires via email or text, letting clients complete forms on their devices. Clients can enter as much or as little data as they have, enhancing transparency, communication, and convenience for both parties. Information can be easily converted and assets collected during intake to create an active matter in just one click, eliminating the need for paper and manual data re-entry. To maximize efficiency, CloudLex offers guidance on Effective Strategies for Personal Injury Intake Management in a free e-book. The software also empowers personal injury (PI) firms to track their leads and ROI through valuable insights and analytics from a quarterly, bi-annual, or yearly perspective, all accessible from the Matter Intake Dashboard. *See Figure 1 on the previous page*.

PI-Specific Matter Management
CloudLex is mapped to the lifecycle of a personal injury case, delivering seamless and smooth case flow for pre-litigation, optimized litigation, automated discovery, trial readiness, and efficient personal injury settlement management. CloudLex offers a range of features to help legal teams manage their cases more efficiently, including Matter Manager, to manage, store, and categorize documents, images, and media files. Users can tag files for faster search, version control, and information management, enhancing productivity and organization in personal injury cases. CloudLex also helps users organize and track all matter-specific information in one place, including unique data on personal injury cases, such as medical information, liens, bills, and expenses. Create and link notes to contacts and track insurance and medical treatments.

As with all court matters, timelines are critical. CloudLex displays a timeline across the top of each matter page, mapping a case's lifecycle. Users can view essential information like the total number of days since case opening, incident date, intake date, statute of limitations date, and other dates the firm deems valuable. Firms can consolidate all matters and attorney calendars into a single firm-wide master calendar, ensuring comprehensive visibility of firm-wide events and deadlines. CloudLex's seamless integration with popular calendars, color-coded by user, and its real-time notification center enable a firm to stay organized and avoid missing a crucial date. *See Figure 2*.

Uber for Attorneys: Hassle-Free Travel Experience with Expense Tracking
Personal injury attorneys are constantly on the go, attending client meetings, court

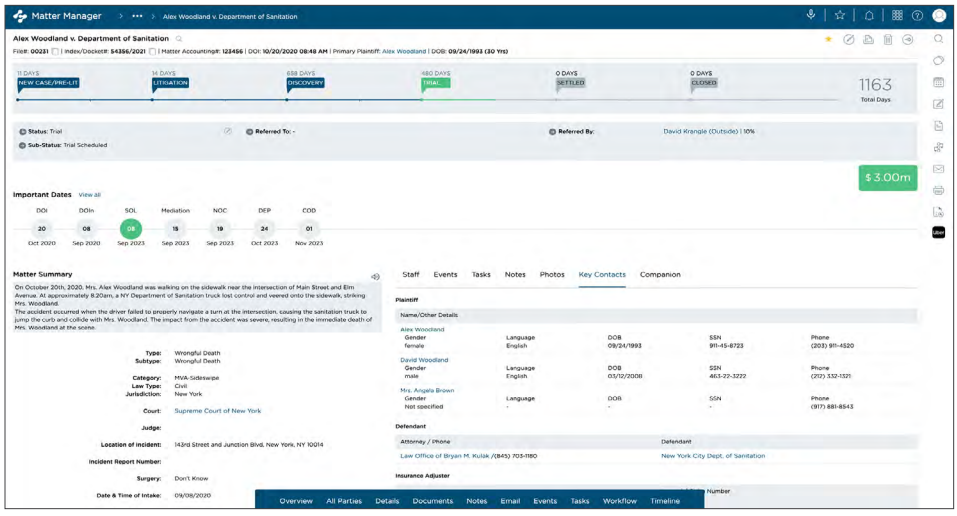


Figure 2: The Matter Manager presents an overview of a specific matter, showing helpful information with easy navigation to a specific area within the case via the global sidebar and the blue ribbon navigation at the bottom of the screen. Users can see the timeline across the top, followed by important dates and a case summary.

> **“CloudLex is mapped to the lifecycle of a personal injury case, delivering seamless and smooth case flow for pre-litigation, optimized litigation, automated discovery, trial readiness, and efficient personal injury settlement management. CloudLex offers a range of features to help legal teams manage their cases more efficiently, including Matter Manager, to manage, store, and categorize documents, images, and media files.”**

hearings, and more. Many clients may not, however, have their own vehicle or mode of transportation. CloudLex’s partnership with Uber allows attorneys to book Uber rides directly from CloudLex, eliminating the need to find a ride and manage receipts manually. *See Figure 3*.

This feature can be used to transport clients to medical appointments or hearings, offering them a convenient and stress-free experience and ensuring the continuation of their treatment. **Trip receipts are automatically recorded in the expense manager**, providing a real-time view of travel expenses and reducing manual processing. They can also be exported directly to QuickBooks Online. When users and their staff book trips for multiple matters, CloudLex Expense Manager automatically captures all necessary trip information, and Uber-specific expense reports can be generated with a click of a button. The convenience, ease of use, and assurance that clients receive exceptional care foster trust in the law firm among its clients.

Pricing
CloudLex was created exclusively for plaintiff personal injury firms, understands the unique considerations, needs, and challenges of personal injury cases, and provides a personalized consultation followed by a detailed and tailored pricing quote.

Who is CloudLex?
Established in 2015, **CloudLex** collaborates with plaintiff personal injury law firms, offering them advanced technology, actionable insights, and expertise to build, manage, and grow their practice. The company’s unified platform, supported by Microsoft Azure’s HIPAA-certified data security, manages productivity, accountability, communication, collaboration, and insights across firms from case intake to settlement and negotiation, including storage and HIPPA-compliant archival.

Why Buy CloudLex?
- Meticulously designed with a sole focus on personal injury law, ensuring that every feature and functionality directly addresses the unique challenges and needs of personal injury attorneys, their staff, and their clients.
- The intuitive interface allows for quick onboarding and easy navigation, enabling teams to work efficiently without the steep learning curve often associated with legal software.
- Enhance productivity with CloudLex’s seamless integration with Microsoft 365 for effortless synchronization and collaboration of emails, calendars, and documents, creating a unified and efficient workflow within the practice.
- CloudLex provides comprehensive customer support so firms have as little disruption to their business as possible and is dedicated to ensuring a smooth, hassle-free experience.
- Hosted and backed by Microsoft Azure’s HIPAA-certified data security.

See CloudLex Today!
Learn how CloudLex can streamline operations, grow your caseload, and save time and money by requesting a demo today! And watch this video to **discover why there is no comparison to CloudLex**. ■

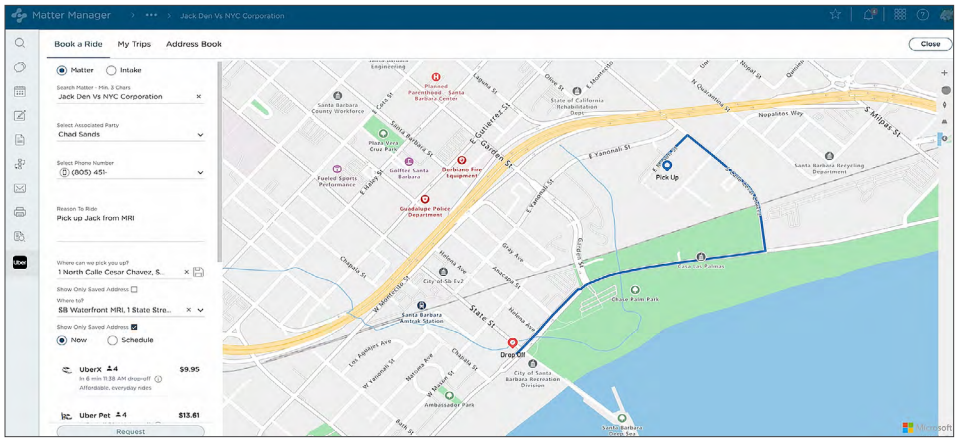


Figure 3: The partnership with Uber helps a firm manage the logistics and expenses associated with client meetings, client medical appointments, trips to court, and more. A car can be ordered directly from the application, making it easy to capture expenses and provide clients with convenient mobility services.

Family Law

CosmoLex by profitsolv

Compliant Legal Accounting Designed for Family Law Firms – No QuickBooks Needed!

Filevine

The Legal Work Platform: Scaling work. Amplifying Family Law teams.

rocket matter® by profitsolv

Made for the Demands of Practicing Family Law

TimeSolv by profitsolv

You Provide Mission Critical Work for Your Clients; TimeSolv's Time, Invoicing, & Payment Tools Do Mission Critical Work for You

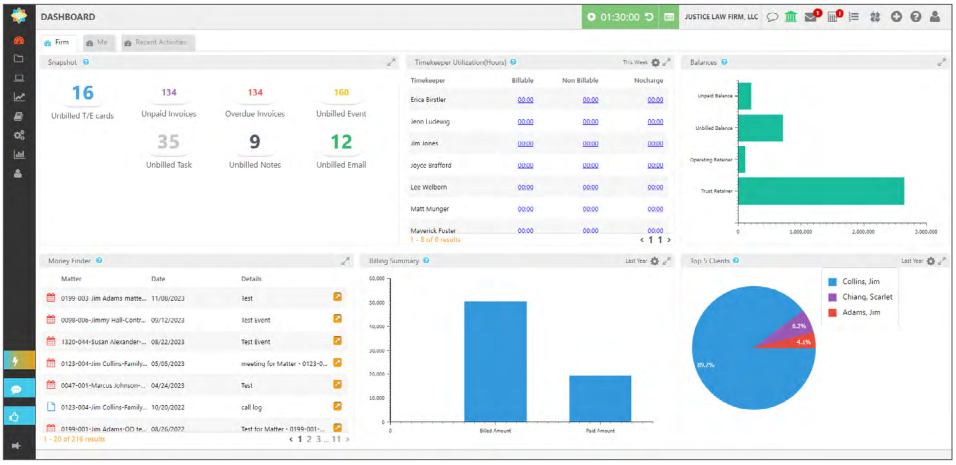
Compliant Legal Accounting Designed for Family Law Firms – No QuickBooks Needed!

Combining robust, cutting-edge practice management tools with industry-leading legal accounting ensures audit worries are a thing of the past. Most family law firms don't have time to do the work necessary to grow the business. That's where CosmoLex comes in with everything tailored for growth, from attracting and working with new clients, to managing your matters, and invoicing and getting paid quickly. And with leading class legal accounting built-in, you don't need QuickBooks. Your accountant will thank us later.

Legal CRM: CosmoLex CRM ensures every lead and prospect is captured and responded to. Client intake forms ensure smooth transition to your matter work. Messaging is easy with built-in softphone and text messaging tools.
Practice Management: CosmoLex puts individual legal matters at the heart of your law practice management software. That means every email, task, event, form, document, billable item, and transaction-every record-is always tagged to its proper client and matter.
Time & Billing: Easy law firm billing options and on-the-go time capturing means time and money won't fall through the cracks. Split billing functionality means complicated billing for family law matters run smoothly.
Accounting: Manage all your law office's bookkeeping and accounting requirements in a single program with built-in compliance checks every step of the way.
Payment: CosmoLexPay provides end-to-end credit card and ACH processing built for reducing payment friction for your clients and you.

CosmoLex will become the heart of your law firm practice. Try CosmoLex free and learn how thousands of family law firms effortlessly stay in compliance and grow their business.

For more information, please visit cosmolex.com



Company Name
CosmoLex
Find us on Linkedin

CosmoLex Review
Click here for the CosmoLex review on page 13 of the 2023 Practice Management Buyer's Guide

About
CosmoLex is the #1 cloud software for legal practice management and is the only fully integrated practice management solution built with the needs of modern small and mid-sized law firms in mind. With built-in compliant accounting, keeping your practice organized and efficient means finally leveling up your technology to your firm's talents. Built-in trust and general accounting mean that QuickBooks is no longer required, reducing costs, and eliminating the frustrations of duplicate data entry, scattered financial data, and backbreaking work to stay in trust compliance Experience compliant and secure practice management, business and trust accounting, timekeeping, invoicing, payment processing, and much more – accessible anytime, anywhere. Find out why thousands of firms use CosmoLex.

Company History
In 2012, our founding visionary, Rick Kabra, Ph.D., realized that the time had come to bring the benefits of "The Cloud" to law offices. Rick saw how Cloud computing can especially help small-to-midsize firms keep their legal technology simple and cost-efficient. Founded on the vision that ALL law firm operational needs should come with a single log-in available in a cloud application, CosmoLex has emerged as an industry leader. Located in Monmouth Junction, New Jersey, CosmoLex is part of the ProfitSolv family of software solutions designed to meet the needs of every law firm, no matter size or practice area.

The Legal Work Platform: Scaling work. Amplifying Family Law teams.

Filevine is dedicated to empowering Family Law organizations with tools to simplify and elevate complex, high-stakes legal work.

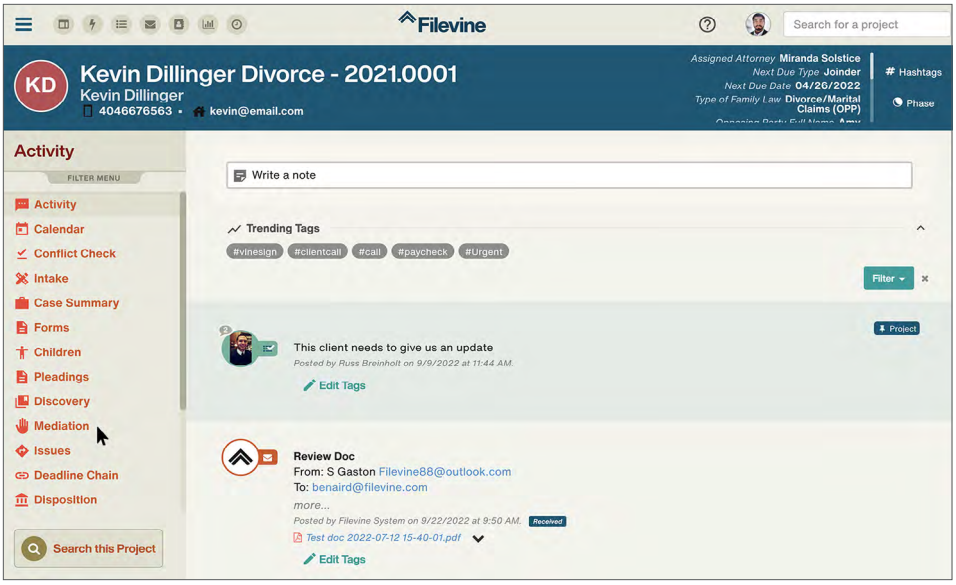
Filevine is The Legal Work Platform. Why? Because Filevine organizes the chaos of legal work by connecting legal workflows and professionals into one fully integrated legal solution. Working with family law clients requires a different level of custom tools to provide–often time strained and struggling–individuals with connection to their legal team. Legal teams aim to ease the stress of these situations with intuitive and comprehensive intake, management, and billing solutions. Our products have been built to simplify and scale work for legal teams to provide a premiere experience to their clients and ease the stress that comes with needing representation.

Family Law case management tools need to be in-depth and complex as the individuals they serve. Whether presented with a divorce case, child custody case, or elder case, Filevine's solutions bridge the gap with powerful tools like:

- Automated task flows and deadline chains
- Centralized text and email communication
- Fast, secure, and collaborative Document Management
- All-in one and synchronous timekeeping, billing & payments
- AI-enhanced document management and assembly features
- Simple and informative business analytics

Not only does Filevine offer these tried and tested solutions for legal teams, but they all work together seamlessly. Connecting everything from task automation to client communication and business analytics to legal documents, Filevine empowers Family Law teams to enhance their customer experience while navigating the chaos within their own organization.

For more information, reach out to us here.



Company Name
Filevine
Find us on Linkedin

Filevine Review
Click here for the Filevine review on page 16 of the 2023 Practice Management Buyer's Guide

About
Filevine is transforming the legal work experience for law practitioners and their clients. As the leading legal work platform, Filevine is dedicated to empowering all organizations with tools to simplify and elevate the industry that needs it most. Powering everything from document management and client communication & invoicing, to contract lifecycle management and business analytics, over 25,000 legal professionals use Filevine daily to deliver excellence in every contract, deadline, and result.

Company History
Filevine was born out of real-life pain. When our co-founders were starting their law firm together they just couldn't find a software solution that suited their needs. There wasn't any software that actually worked for professional workflows. This type of work is complex, requires close communication, and can span months or years. So, they decided to build it themselves. 7 years later, Filevine now serves over 3,000 customers. Ranging from single attorney firms in Texas to enormous law firms with offices in every major metro, our software is customizable and will easily work with your existing workflows.

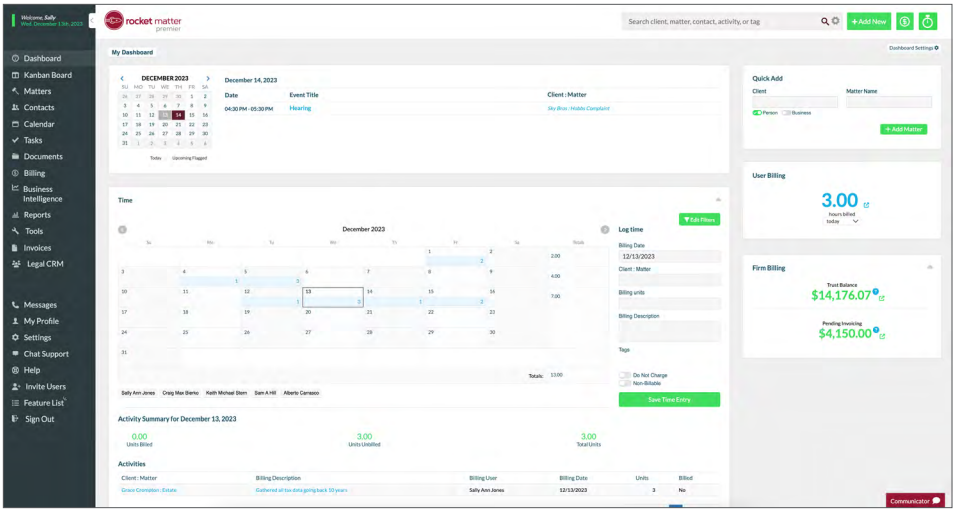
Made for the Demands of Practicing Family Law

The software that lives up to your family law firm's skills.
Rocket Matter ensures your technology levels up to your talents.
Recognized by Forbes as the best legal practice management software for all firm sizes, Rocket Matter provides the necessary tools family lawyers need to grow their business, from intake and marketing to getting paid quickly after successful completion of a matter. The revolutionary Rocket Matter Track tool let's attorneys track time passively as they work and then easily assign to the right matter. Combined with unique Kanban board project management tools, Rocket Matter is tailored for family law firms to keep them organized and on-track.

Legal CRM: Build automated campaigns to bring in new clients and foster strong relationships to keep current clients coming back.
Practice Management: Rocket Matter becomes the heartbeat of your firm, from matter templates to workflow automations, and Kanban-style project management. Share files and request signatures with ease, all without leaving Rocket Matter. Creating tasks, keeping your matter calendar, and diving into business intelligence about your firm are all intuitive and at your fingertips.
Time & Billing: Track time passively on your computer for your clients and seamlessly create and edit your invoices in real time.
Payments: Rocket Matter Pay means easily providing a path for your clients to pay you quickly.
Customer Service: No other legal practice management provider can boast seven consecutive customer service excellence awards. Rocket Matter will ensure success using our tools. Your success is our success, every day.

Try Rocket Matter for free with unlimited training and support and learn why thousands of family law firms have made the switch.

For more information, please visit rocketmatter.com



Company Name
Rocket Matter
Find us on Linkedin

Rocket Matter Review
Click here for the Rocket Matter review on page 31 of the 2023 Practice Management Buyer's Guide

About
Voted by Forbes as Best for All Sizes, Rocket Matter's legal practice management software is designed to unlock your firm's potential through technology. From CRM and legal intake to matter management and legal billing to reporting and analytics, Rocket Matter rises to the skills of your firm to run a more efficient, profitable practice. Keep all your client matters in one place, along with managing your documents, signature requests, emails, tasks, and billable activity so that nothing gets lost in the cracks. Use built-in Kanban Boards to visualize each task and assign it to the proper employee.

Company History
Rocket Matter is recognized as the first cloud-based practice management software for lawyers, providing solutions since 2007. Since then, we've grown to help thousands of law firms and attorneys do their work faster and more efficiently by listening to their needs and pain points. Located in Boca Raton, Florida, Rocket Matter is part of the ProfitSolv family of software solutions designed to meet the needs of every law firm, no matter size or practice area.

You Provide Mission Critical Work for Your Clients; TimeSolv's Time, Invoicing, & Payment Tools Do Mission Critical Work for You

TimeSolv is the #1 solution for family lawyers who demand precise timekeeping, billing, and payments.
TimeSolv has become the preferred web-based billing, timekeeping, and payments solution for tens of thousands of family law attorneys and is why we're the **#1 ranked software for usability**, according to G2.

After being in business since 1999, we know a successful practice must have the right time, billing, and payment software.

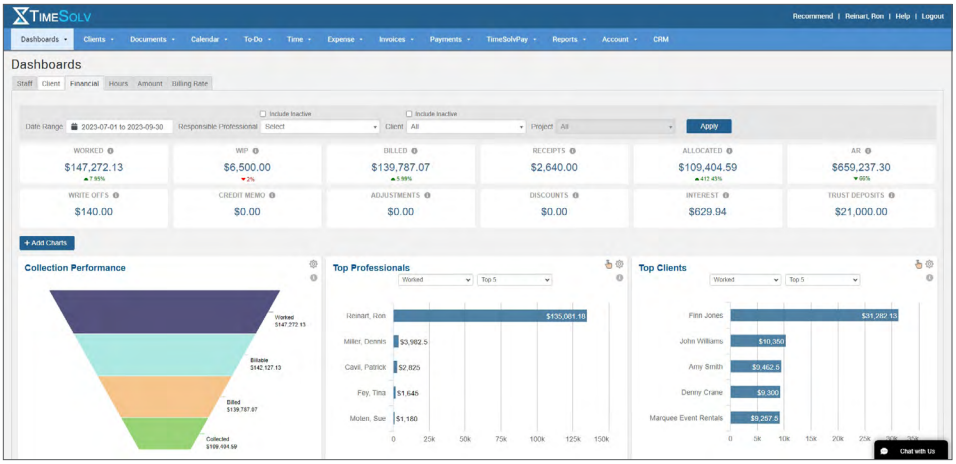
> **Time Tracking:** Take the 10-second challenge. TimeSolv's tools allow you to create time entries with full descriptions in less than 10 seconds on your phone, tablet, or computer. Firms with intricate billing rates and situations need TimeSolv's flexibility. There is not a billing scenario TimeSolv cannot handle.
> **Invoicing:** Send hundreds of invoices with just a few clicks. If you need to void or edit a sent invoice, you're in control with numerous editing features, including industry-leading split billing for complicated family law matters. Billing day just became the easiest day of the month.
> **Payment:** With built-in TimeSolvPay, collect and store payment information on your clients and run payment on your time schedule. Run hundreds of payments with one click, ensuring zero AR for every client.

Integrations with Office 365, NetDocuments, and Dropbox means best in class tools married to our software.

Keep accounting up to date with our unique two-way integration with QuickBooks (online AND desktop) for easy syncing, as well as over 30 different reports.

Try TimeSolv for free for 30-days with unlimited one-on-one training and support.

For more information, please visit **timesolv.com**



Company Name
TimeSolv
Find us on Linkedin

TimeSolv Review
Click here for the TimeSolv review on page 9 of the 2023 Time, Billing & Payments Buyer's Guide

About
TimeSolv is ranked as the #1 legal billing software for usability, with simple, intuitive features to increase your firm's time, efficiency, and productivity. Online and offline time tracking makes tracking your time easy, and TimeSolv's mobile app allows you to track your time on the go. Create automatic invoices and share information with clients and employees. Daily to-do lists keep every member of your staff on track. Billing templates allow you to customize your invoices exactly how you want, and TimeSolvPay lets you store credit card and eCheck/ACH information in TimeSolv and run batch payments for hundreds of invoices at once.

Company History
Founded in 1999 by Thomson Reuters, and privately held since 2006, TimeSolv has evolved into a modern, web-based time and billing solution that serves thousands of lawyers and other professionals in over 25 countries. Located in Eagan, Minnesota, TimeSolv is part of the ProfitSolv family of software solutions designed to meet the needs of every law firm, no matter size or practice area.

Immigration

Filevine

The Legal Work Platform Immigration Firms Rely on to Scale Their Work and Amplify Their Teams

The Legal Work Platform Immigration Firms Rely on to Scale Their Work and Amplify Their Teams

As the leading legal work platform built to meet the needs of immigration lawyers and their teams, Filevine makes all the facets of complex legal work seamless, transparent, and effortless for legal professionals and the clients they serve.

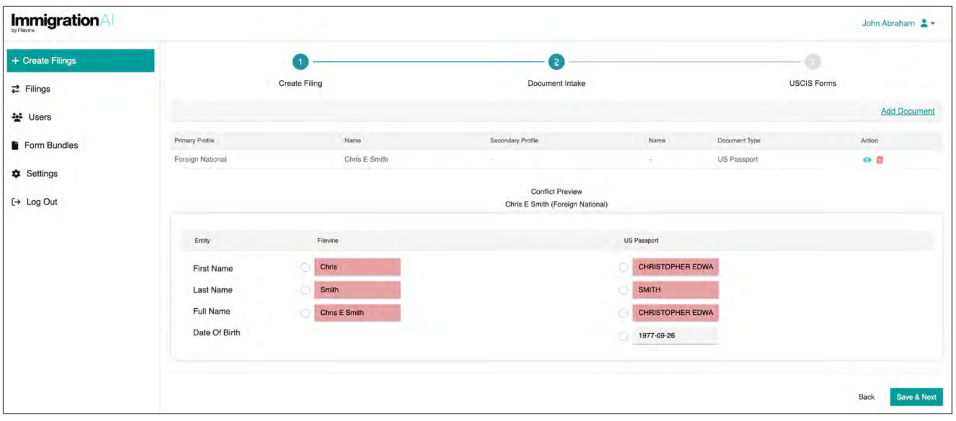
Matters of naturalization and citizenship are high-stakes and, for firms specializing in immigration law, the ability to customize workflows for every case type and track every detail and deadline is critical. With customizable workflows for every case type, deadline tracking and alerts, and centralized management and reporting for all your documents and client data, Filevine keeps your team on track so you always know what the next steps are for you and your clients.

As a full legal suite, Filevine offers:

- Fill out all USCIS forms in just a few seconds with AI-enhanced document processing has revolutionized the way intake information is captured, significantly enhancing its accuracy and efficiency. This innovative technology allows for unparalleled processing of large volumes of data in real-time, ensuring minimal chance of human error.
- Robust client communication with texting, email, automated reminders, and eSignature for time-sensitive electronic forms
- Centralized document management that allows you to edit, search, share, and store documents with ease
- Team collaboration with case notes, task flows, sidebar discussions, and more
- Advanced reporting and dashboards that give you full visibility into every aspect of your business

And with best in class compliance, privacy and security programs, Filevine ensures your and your clients' data is always protected.

For more information, reach out to us here.



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Compliant Legal Accounting – No QuickBooks Needed!

TimeSolv by profitsolv

The Exact Tools You Use to Manage Your Real Estate Law Matters

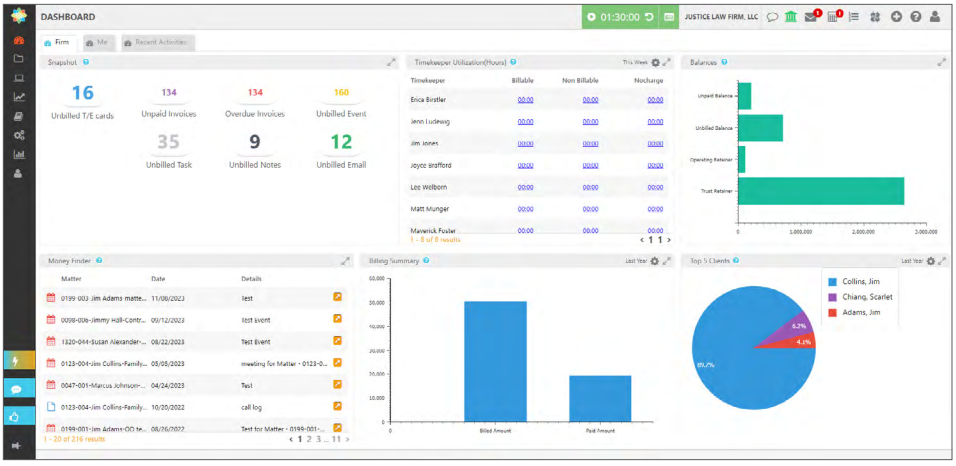
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CosmoLex will become the heart of your law firm practice. Try CosmoLex free and learn how thousands of real estate firms effortlessly stay in compliance and grow their business.

For more information, please visit cosmolex.com



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The Exact Tools You Use to Manage Your Real Estate Law Matters

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After being in business since 1999, we know a successful practice must have the right time, billing, and payment software. And most importantly, your firm should only be paying for the features you actually use.

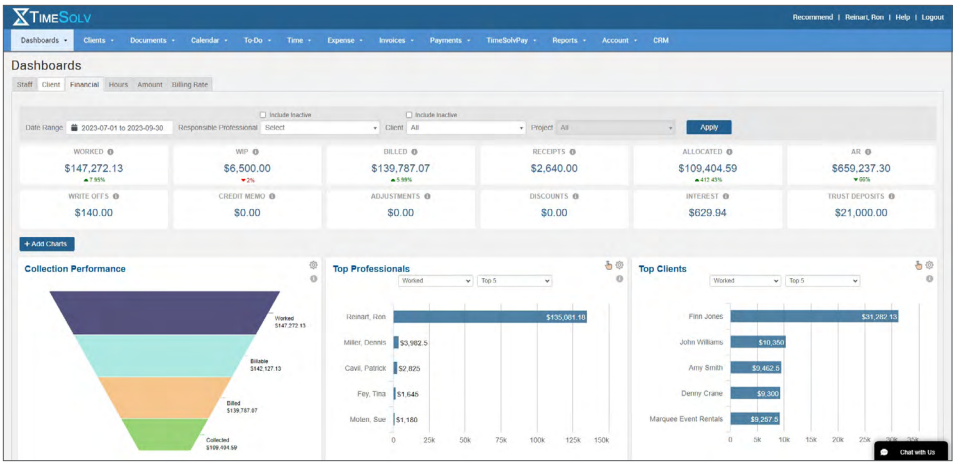
Time Tracking: Take the 10-second challenge. TimeSolv's tools allow you to create time entries with full descriptions in less than 10 seconds on your phone, tablet, or computer. Firms with intricate billing rates and situations need TimeSolv's flexibility. There is not a billing scenario TimeSolv cannot handle.
Invoicing: Send hundreds of invoices with just a few clicks. If you need to void or edit a sent invoice, you're in control with numerous editing features. Billing day just became the easiest day of the month.
Payment: With built-in TimeSolvPay, collect and store payment information on your clients and run payment on your time schedule. Run hundreds of payments with one click, ensuring zero AR for every client.

Integrations with Office 365, NetDocuments, and Dropbox means best in class tools married to our software.

Keep accounting up to date with our unique two-way integration with QuickBooks (online AND desktop) for easy syncing, as well as over 30 different reports.

Try TimeSolv for free for 30-days with unlimited one-on-one training and support.

For more information, please visit **timesolv.com**



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TimeSolv
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TimeSolv Review
Click here for the TimeSolv review on page 9 of the 2023 Time, Billing & Payments Buyer's Guide

About
TimeSolv is ranked as the #1 legal billing software for usability, with simple, intuitive features to increase your firm's time, efficiency, and productivity. Online and offline time tracking makes tracking your time easy, and TimeSolv's mobile app allows you to track your time on the go. Create automatic invoices and share information with clients and employees. Daily to-do lists keep every member of your staff on track. Billing templates allow you to customize your invoices exactly how you want, and TimeSolvPay lets you store credit card and eCheck/ ACH information in TimeSolv and run batch payments for hundreds of invoices at once.

Company History
Founded in 1999 by Thomson Reuters, and privately held since 2006, TimeSolv has evolved into a modern, web-based time and billing solution that serves thousands of lawyers and other professionals in over 25 countries. Located in Eagan, Minnesota, TimeSolv is part of the ProfitSolv family of software solutions designed to meet the needs of every law firm, no matter size or practice area.

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