

CHOOSING LEGAL SOFTWARE SOLUTIONS

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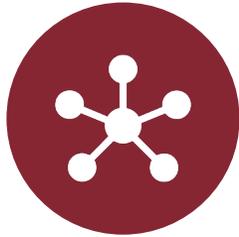
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AGENDA



Introduction



Components of Legal Office Solutions



Firm Requirements



Identify & Evaluate Solutions



A BIT ABOUT ME...

**35 Years
of Experience**

**Certified Public
Accountant**



**Worked with
100s of Law Firms**

**100s of hours
spent evaluating and
learning solutions**



COMPONENTS OF LEGAL OFFICE SOLUTIONS



Time & Billing



Document Management



Accounting



Calendar



Trust Accounting



Contact Management/CRM



Practice Management



Practice Specific Solutions



FIRM REQUIREMENTS

Questions to answer first:

Size of firm

Age of computers

Number of locations

Operating Software:
Windows or Mac

Access Method - VPN

IT Support

Premise or Cloud



EVALUATE

All-in-One

Different integrated solutions

Nothing is perfect

Evaluate your current solution objectively



CONVERSIONS

Current data converted into new software

Be specific about what will be converted:

- Matters
- Client
- Contacts
- Calendar
- Saved documents & emails
- Billings – Details or only balance forward



CONVERSIONS

Best time: Never

Nothing is perfect

Test Conversion

Actually see data in new application and do your own checks

Training: Don't minimize its value

Always more effective than learning as you go

ONE FINAL PIECE OF ADVICE...

STAY FRIENDS WITH YOUR SOFTWARE VENDOR



Join User Group



Attend Conferences



Annual Maintenance



Stay Current

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