

IS CLOUD-BASED BASED PRACTICE MANAGEMENT SOFTWARE READY FOR PRIME TIME?

By Gerri Martin on Behalf of
CENTERBASE

I am always concerned when a client calls and asks about “going to the cloud.” It means so many things. The term “cloud computing” simply means storing and accessing data and programs over the Internet instead of your computer’s hard drive or server.

This article discusses Cloud-Based Practice Management Software. Whether or not you should move to the cloud is an entirely different topic. Assuming you are ready to make the move to a cloud-based package, there are things you should know.

Types of cloud services

To put things into their simplest form, you can use the cloud for Infrastructure and/or Software. When using cloud services for infrastructure, the cloud provider acts as your server. When software is involved it is called Software as a Service (SaaS). With SaaS, you are using the servers of the software company to run the software and database. Since each software company has its own servers, you may have problems when trying to share data between software packages.

What is the State of Cloud-Based Practice Management Software?

Now that we have the terminology down, let’s look specifically at cloud-based law firm practice management software. Whether on-premise or cloud-based, a practice management program should be a firm-wide database to store case information, contacts, documents, mail, email, phone calls, appointments, todo, deadlines, research, and time

entries. By maintaining this data in a single database, you benefit from efficiency, reliability, automation of tasks and documents (workflow), reporting, and analysis. And many practice management programs provide billing, accounts receivable, and accounting for complete firm-wide management.

With premise-based servers, the ability to integrate software and combine data from multiple programs became possible as SQL-type databases made it easier for software to talk to each other. With the new Cloud frontier, we are back to the early days of technology. Software developers write their cloud programs using proprietary ways to store the data. It is often not accessible to other programs making linking and reporting difficult. Think Betamax versus VHS.

Know the difference between linking and integration

These terms are frequently used interchangeably. Understand what you are getting. In my opinion, when programs are linked, one program sends information to the other program to either create or update information. It is one-way communication and must always be initiated from the “main” program.

Integrated programs have two-way, real-time sharing of data. A change in one system, will update the other instantly. While we would all love fully integrated programs, the reality is the market is not there yet. That does not mean that linked is bad, it just means you must understand its limitations.

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So, what does this mean to you? Because many of the cloud-based packages are hosted on different servers, you may not get them to talk to each other. It means that, for now, given the state of the art, you must find a comprehensive package that is modifiable, has strong reporting capabilities, and committed to further development. The more features you find in a single package, the better it will be for you. There is no one perfect software package. You must find the one that works for you.

How will you find the right package?

Ask yourself hard questions and be honest. Look at the software solutions you want to replace. What features do you use most and how well do they work for you? What features don't you have that you want? Now for the hard question: Does your software actually do those things but you do not know how? Hiring an expert to do setup and training will be much cheaper and less stressful than moving to a new package and repeating the same mistakes.

If you truly must switch, start by asking other firms in your field of practice what they have and how they like it. If you are a personal injury firm, asking a family law firm will not be beneficial. Do internet research and ask for demos. Use these generic demos to help you compile a list of features you like. Once you have compiled a feature list, go back to the software you liked and ask the company to do another demo showing, in more detail, some of the key features you want. If you still like what you see, have a final demo to involve the stakeholders. Consider involving the billing manager, accountant, a paralegal, other partners, and attorneys.

Switching practice management software will be a process that requires realistic expectations. Try a controlled, limited test. Pick a few representative matters and set them up. Use the features to make sure the program will be the right one for you. I will selfishly tell you, using a consultant, will make the project more likely to succeed. Studies by software vendors support this. Implementations are smoother and customers are happier when a consultant is involved.

About Centerbase

Centerbase is a full-service, cloud-based legal practice management solution that includes workflow, matter management, document management and document assembly, time and billing, and accounting. The platform is infinitely customizable, with support for unlimited custom fields and custom objects. It is also cross-platform, running on Windows and Mac systems, with special apps for iPhone and Android. To learn more, contact sales@centerbase.com or give us a call at (214) 987-9000.

About Gerri Martin:

Software Analysis Corporation is an affiliate of Crosspointe Consulting Group, LLC. We're faster than a speeding help key, more knowledgeable than the support service manual and more attuned to your needs than any tech support line rep could ever be. Gerri Martin, a Partner with Software Analysis Corporation, is a CPA. This gives Gerri the business background needed to understand the financial and management implications of implementing software and business processes. With her Masters' degree in Project Management and previous PMP certification in Project Management, her background lends itself to helping firms streamline their workflow and eliminate needless duplication of effort.



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