Online Live Stream

Strategies to Scale Your Firm with Automation

Speakers

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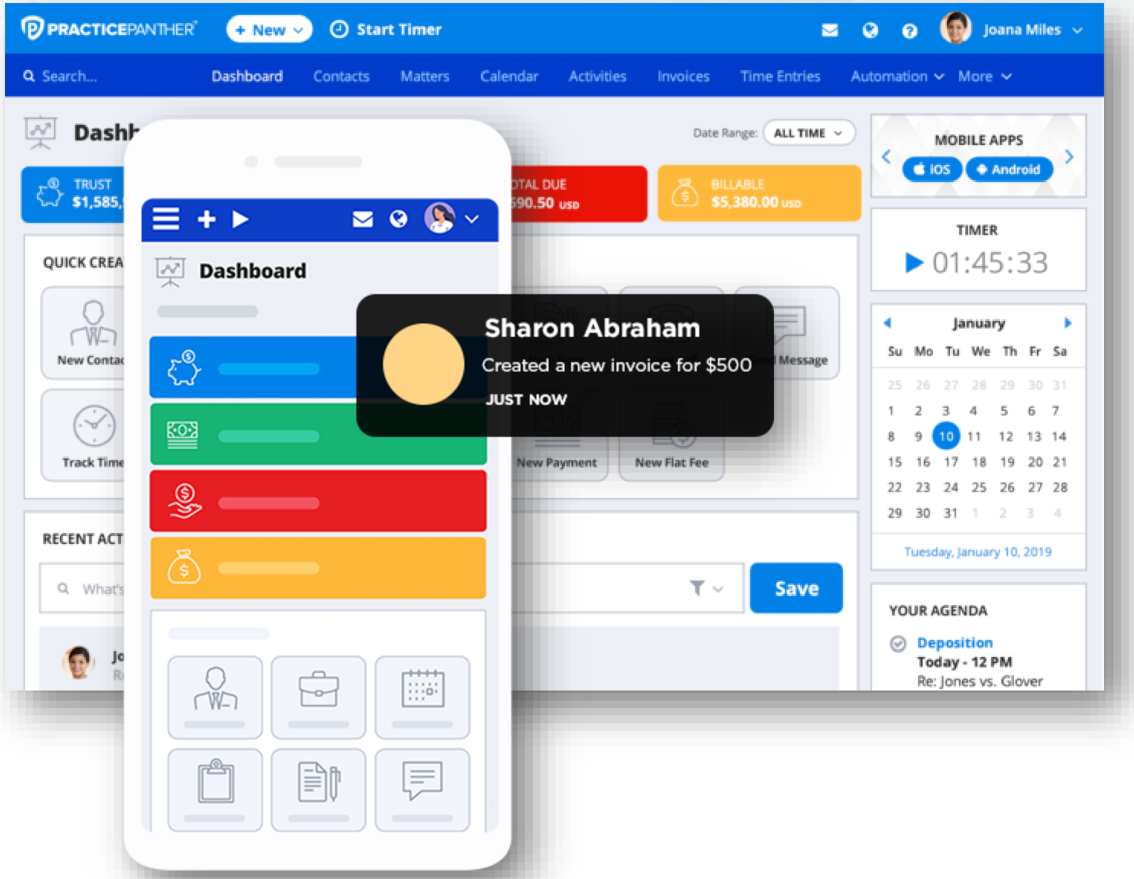
All-in-one legal practice management software



Automate workflows
Set conditional tasks, reminders, and custom tags.

Seamless case management
Link your contacts, matters, and invoices.

Built-in compliant payments
100% compliant with IOLTA, ABA, and all 50 state bar guidelines.

Secure, built-in eSignature
Easily send multiple documents for signing at a time. Send and view signed copies of documents from PracticePanther.

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Today’s discussion

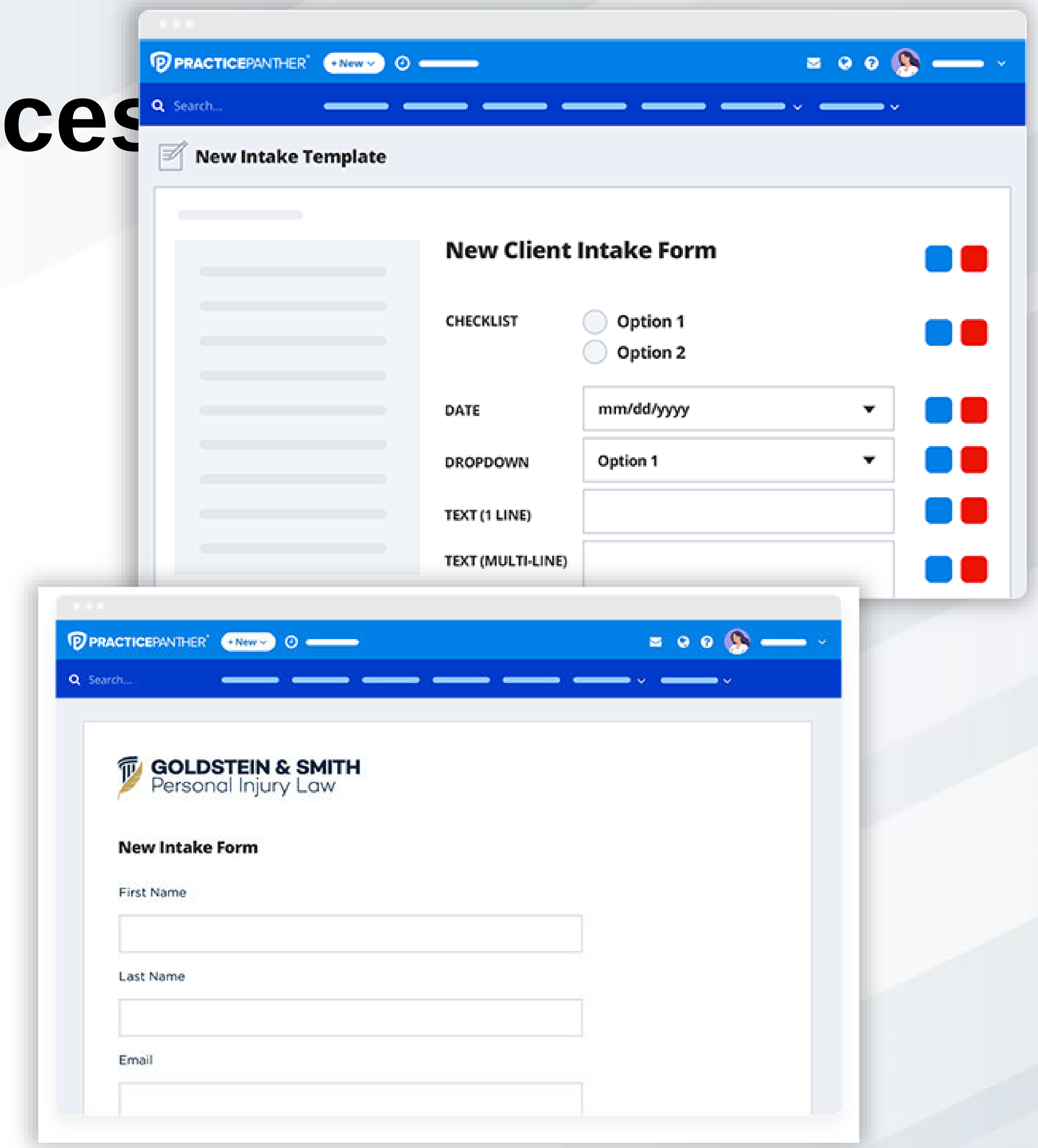
- Importance of clean intake
- Using templates to speed internal processes
- The power of automated workflows
- Scaling through batch operations
- Tips to stay organized

Streamline intake proces for clarity

Fast & seamless intake process
Go paperless and invite clients to fill out intake forms on your website or via an iPad in the office. No more shuffling paperwork.

Customize the look & feel
Build unlimited intake forms that reflect your firm.

From Lead to Referral
Intake forms can be multi-functional for different stages in a case.



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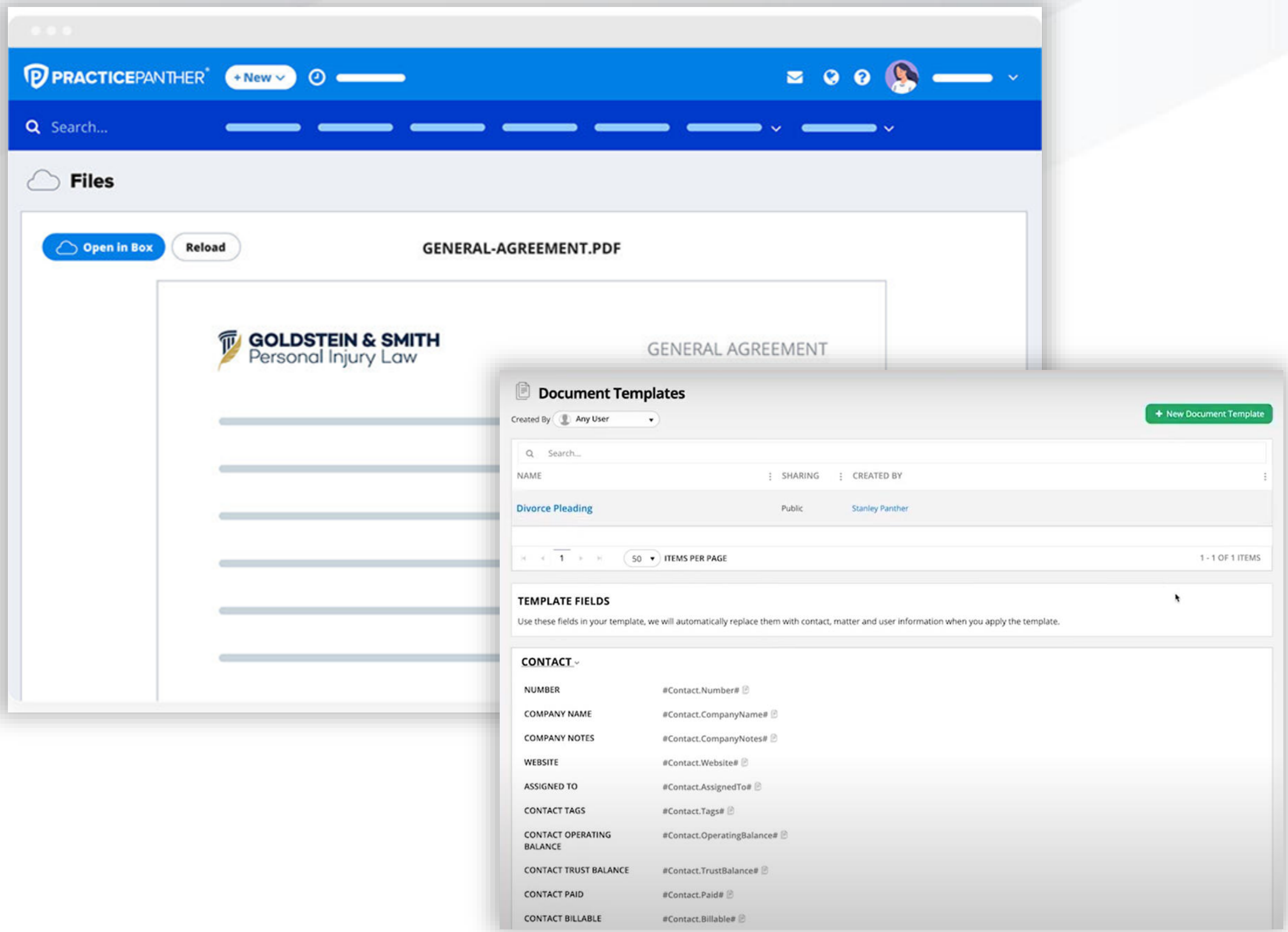
Utilize custom document templates



- Create and customize templates for demand letters, wills, fee agreements, and any type of document you need to generate repeatedly — then use it again and again.
- Our white-label templates let you send professional documents with your logo, not ours.

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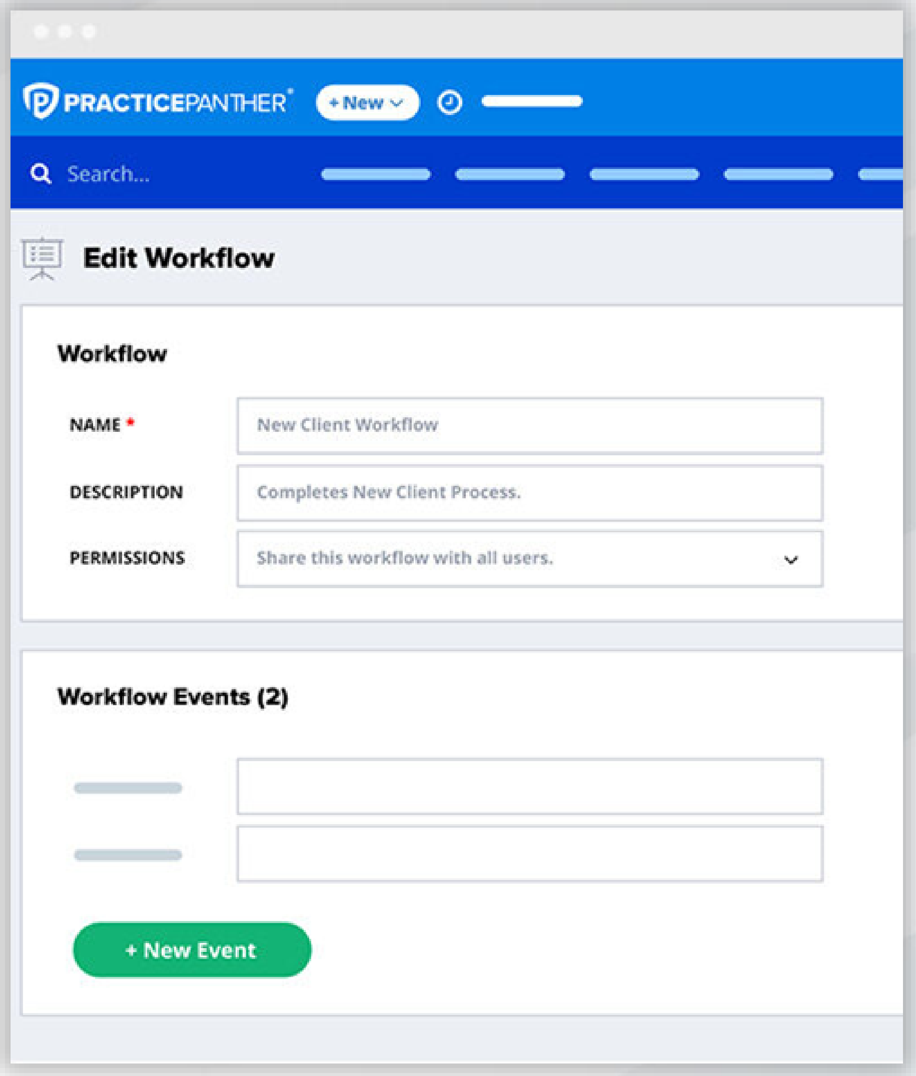
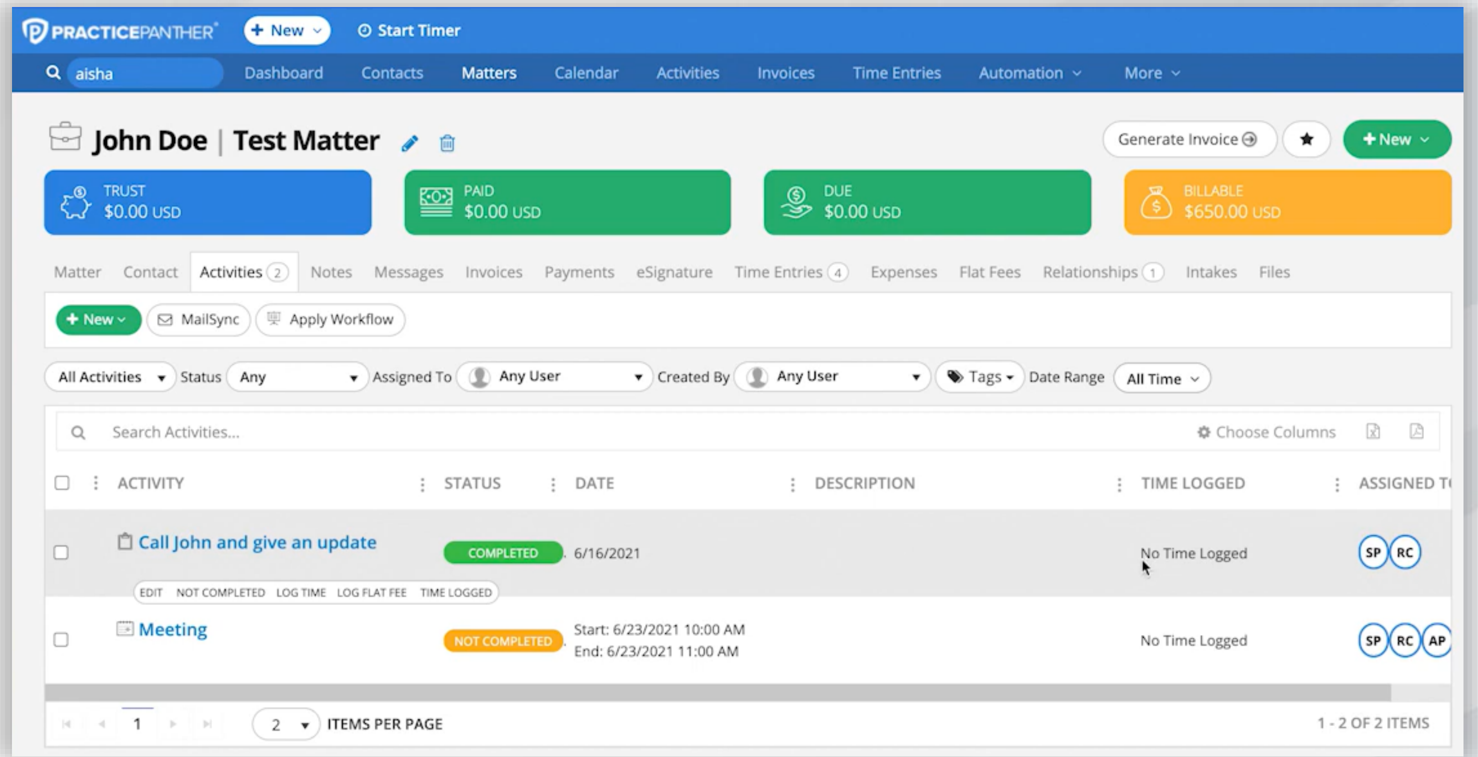
Set tasks on autopilot with custom workflows

- Automate repeat steps and create a flow of tasks that need to happen each time.
- Reduce errors, align with colleagues, and always be a step ahead with our customizable workflows.



How to track time to save you time

- Studies show lawyers that enter time monthly lose 55%-70% of their time*
- Ditch the sticky notes- track time *as it happens* with built-in timers
- Review your account on Friday's and you can find 1-2 hours a week on average that would've fallen through.
- Utilizing batch time entry means approving 10 timesheets in the time it would take to input one.



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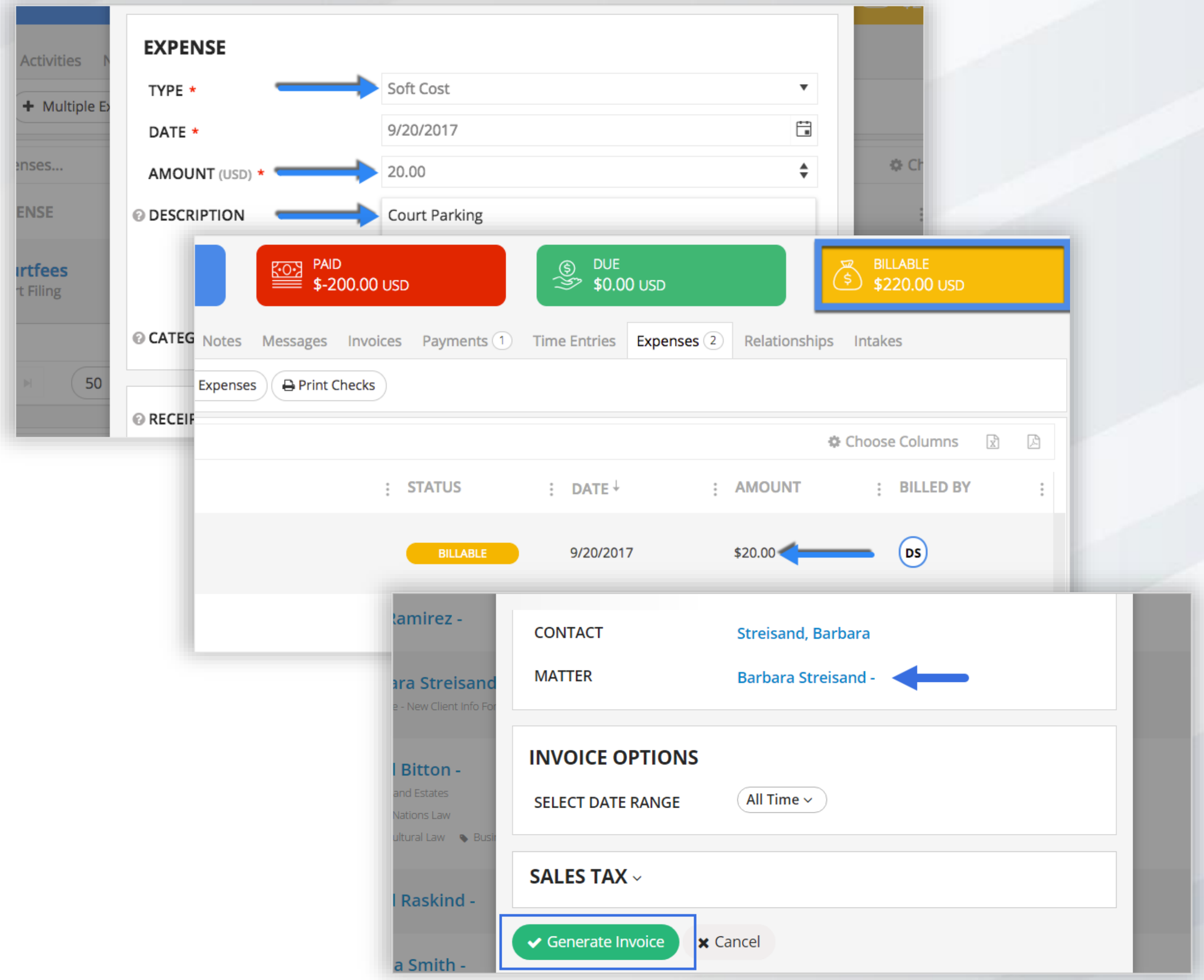
*attorneyatwork.com/make-the-timekeeping-honor-roll

Expenses made easy

- Stay on top of expenses daily
- Record hard and soft costs
- Pay out expenses from Trust accounts
- All transactions show up on invoices which can be generated with one click
- Run reports on expenses by category or matter



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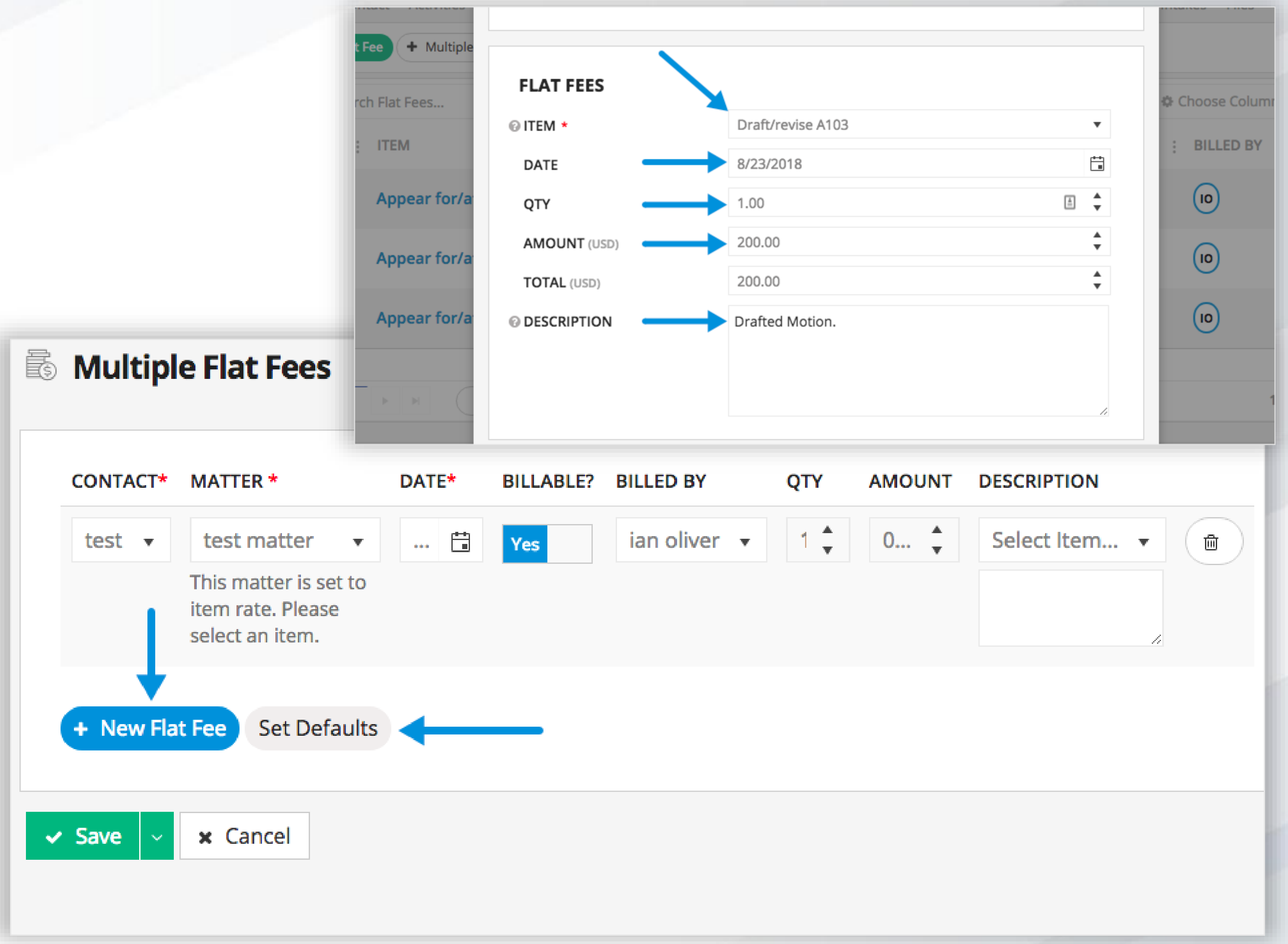
What about flat fees?

- Flat fee billing is vital to many law firms
- Just as simple as logging expenses
- Enter single or multiple flat fees at once
- Generate flat fee reports by contact, matter, user, status, or even flat fees over time



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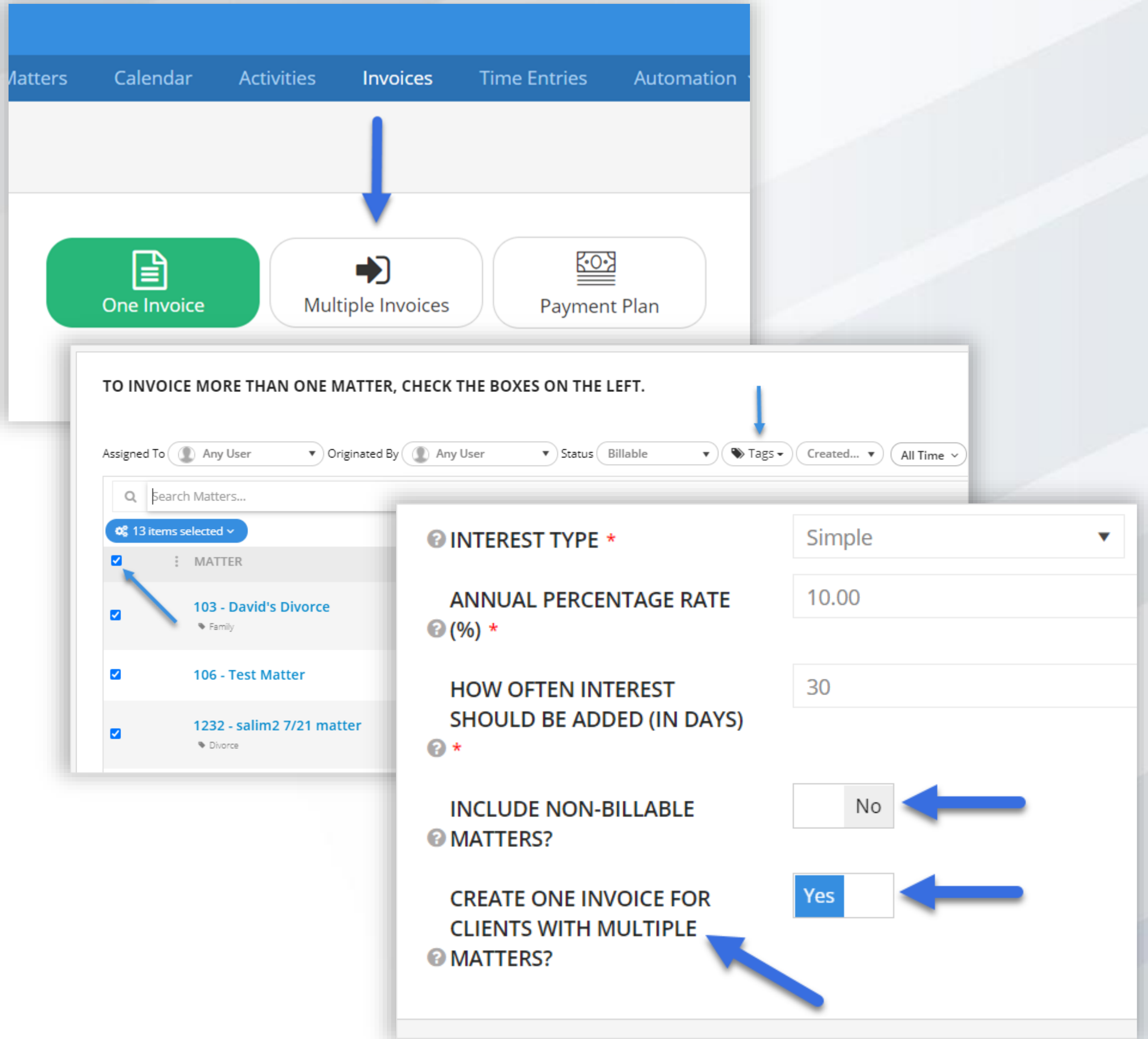
Create batch Invoices to save time

- **Save hours** monthly by batch invoicing (Recommended)
  - Avoid having to create each invoice separately
- New Invoice → Multiple Invoices
- Select all matters or hand pick specific matters by case type using the “Tags” filter
- Can even add interest or invoice non-billable matters
- Simplify client payment by grouping multiple matters into one invoice per client
  - Client pays once instead of once per matter!



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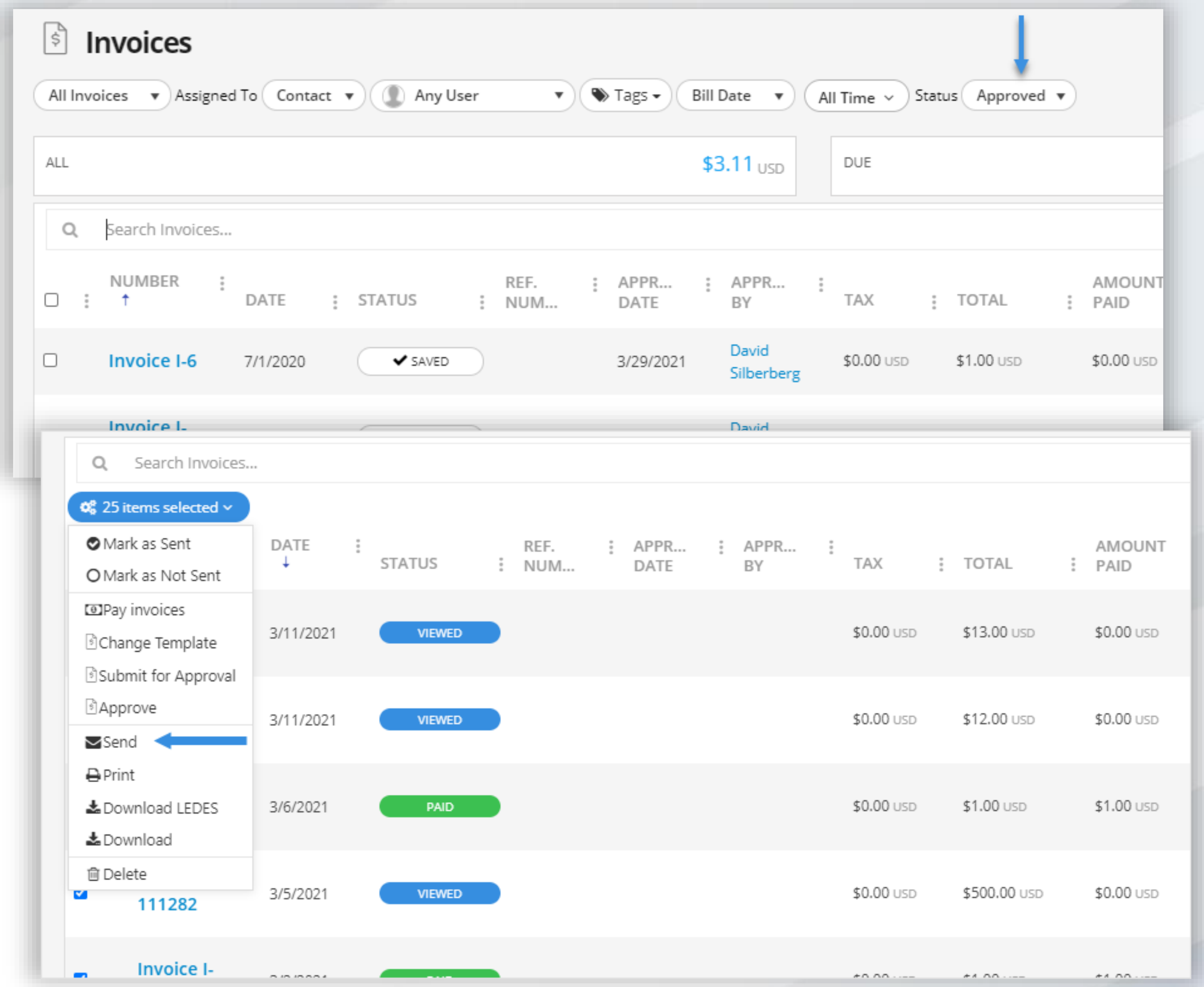
Batch email your invoices quickly

- **Hours** can be saved batch sending invoices (Recommended)
- Once the bills are generated, it's time to finalize and send!
- If your firm utilizes the invoice approval process, simply filter to status "Approved" when it comes time to send
- Select all invoices using the header check-box
- Click "Send"
    - All invoices are sent to primary contact within company contacts



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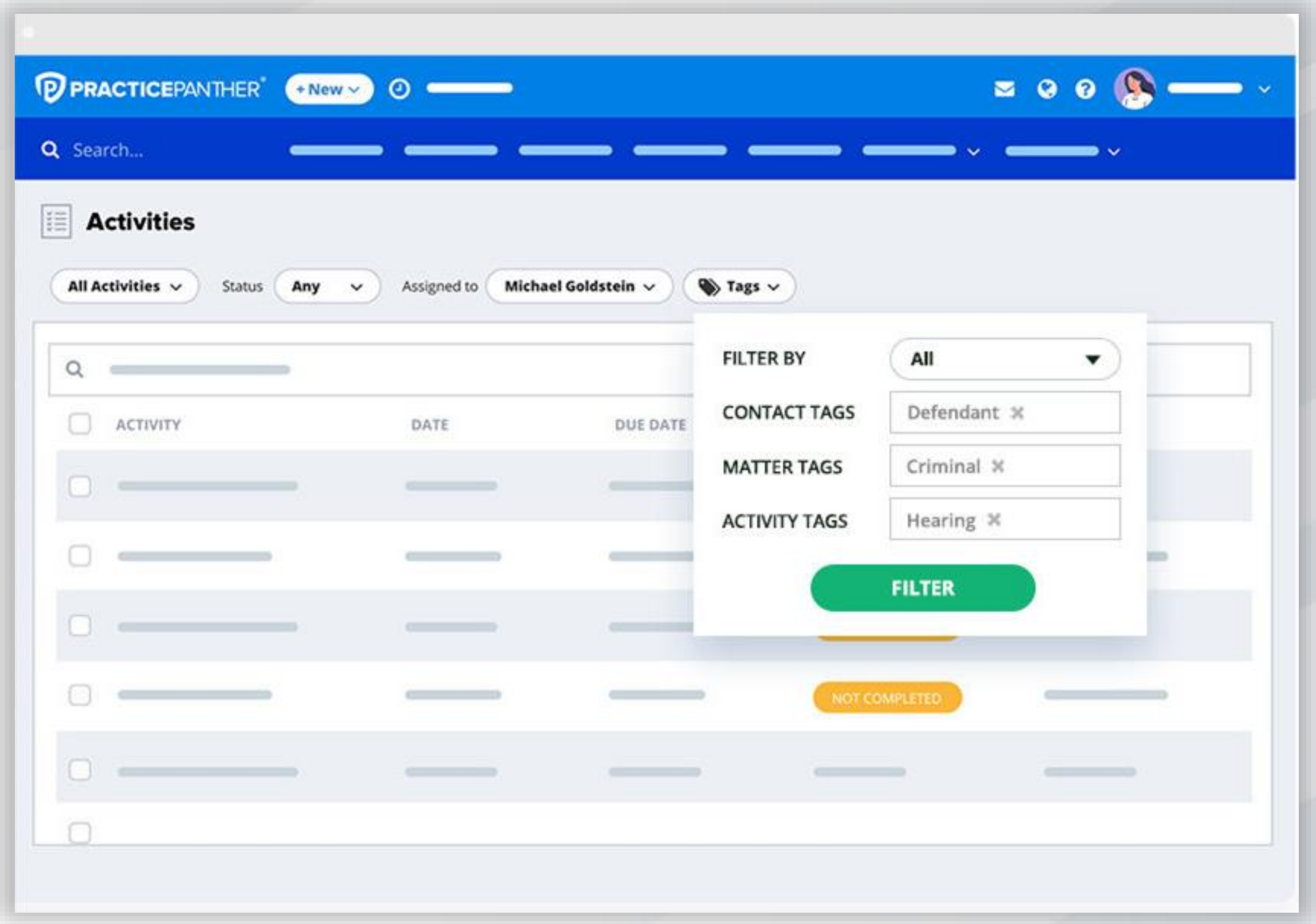
Organize with Reports & Tags

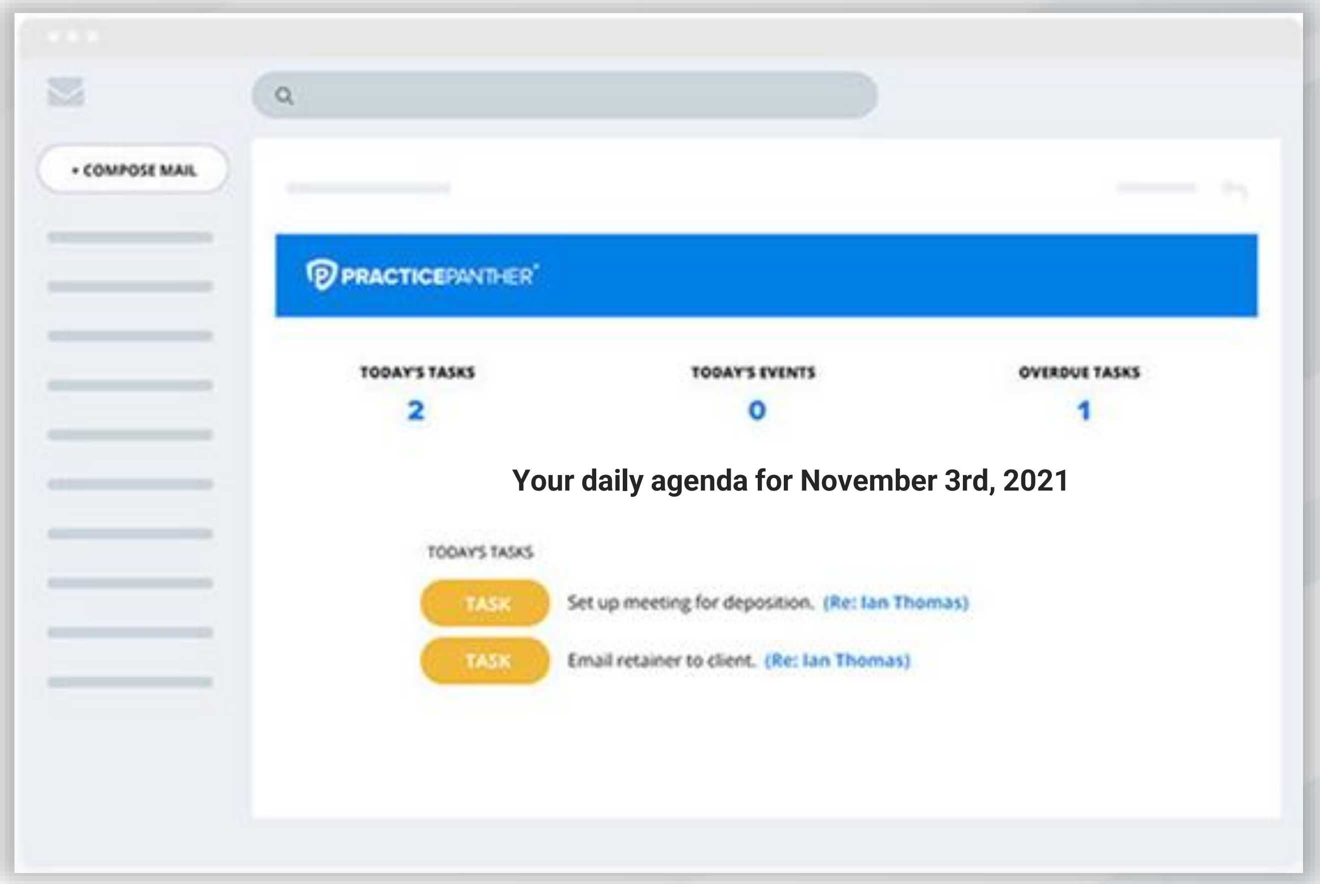
- Set tags on Contacts, Matters, or Activities to explore which practice areas are the busiest.
- Ability to answer questions on the fly.
- Establish tags for different locations, courthouses, or jurisdictions for custom insight.



Stay on top of everything

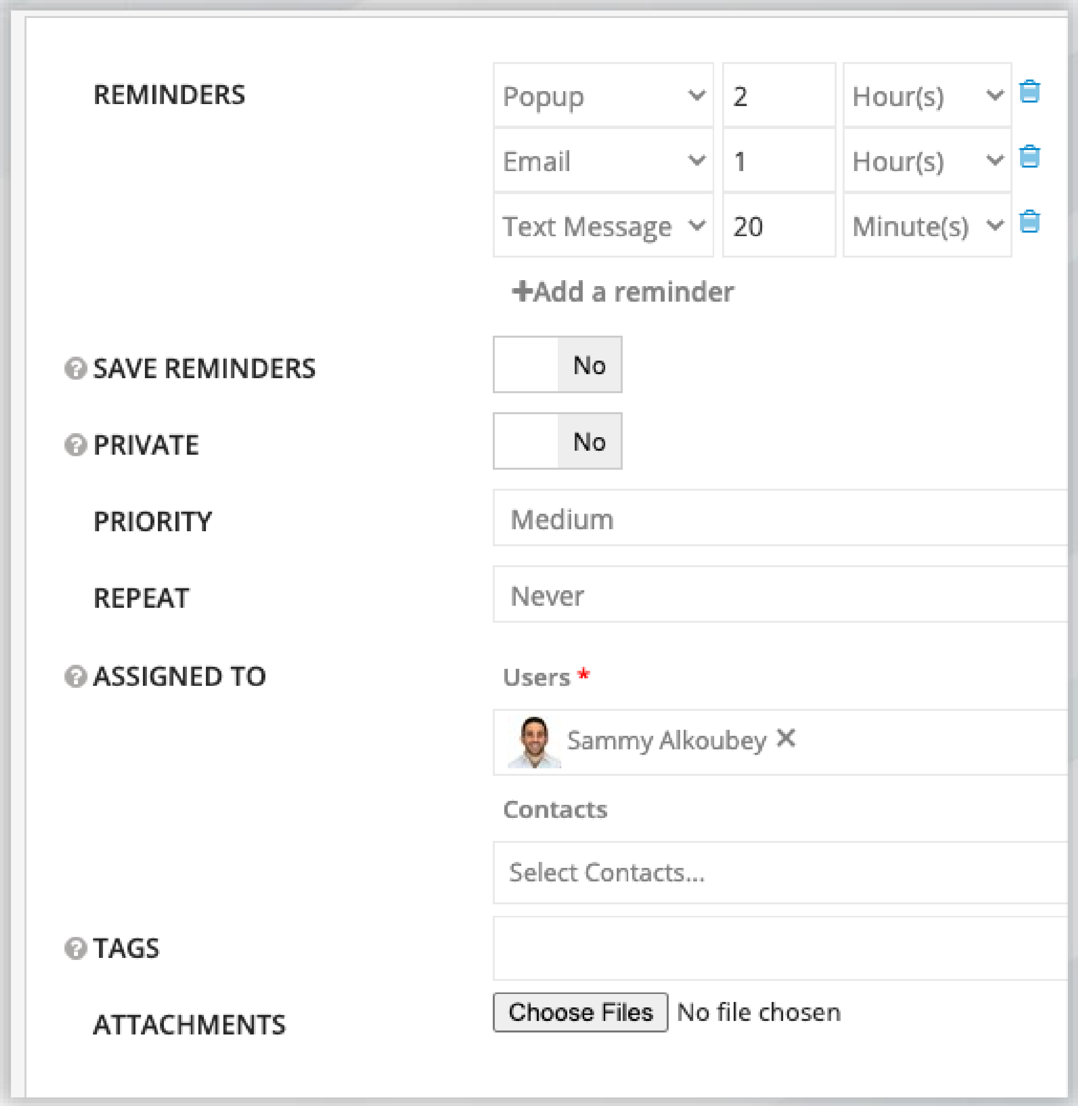
- Receive daily agenda emails in the morning and get notifications for different tasks & events related to the case.

- Keep a pulse on what's been completed and what hasn't so you never drop the ball with your task dashboard.



Set reminders to stay on task

- Set reminders where it makes most sense for you and stay in sync with your team.
- Automate your workflows and set timed rules for your tasks.



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Q&A

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