SPECIAL GUEST REPORT

The Sorry State of Legal Practice Management Software

...or one attorney's on-going quest for a product that just works.

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My name is Avi Frisch and I am a practicing attorney from New Jersey. I am a true solo – with no staff and I enjoy technology and the efficiencies it brings to my solo life.

For the past several weeks, I have been on the hunt for a new legal practice management program after almost three years of using Clio, a cloud based practice management program. For quite a while I had been pretty happy with Clio and had actually frequently recommended it to colleagues.

I started to become gradually disillusioned with Clio only over the past few months. While I was always aware of some flaws, Clio had been frequently updated and seemed to improve considerably over time. This forward motion had given me hope that eventually Clio would be a perfect tool for my practice. An example of what I liked was that as a web based program Clio worked everywhere I went -- quite helpful for a true solo with no regular employees in his office.

Unfortunately, it started to dawn on me that Clio had stopped improving, probably because the company began to focus on items that were outside its core business. They hosted a "user conference" that resulted in the release of an iPhone app in September 2013. But that was the last major addition made to the platform until a redesign of the interface was recently released.

Two major flaws caused me to start looking at other programs and I began to realize that there is much more that my software should be able to do for me. Clio's statement of account mechanism is seriously flawed and produces incorrect numbers. This caused me great embarrassment with a long time client. In addition, Clio's API has major security issues and allows third parties way more access to data than it should. In my opinion, Clio should terminate its API program and focus on improving its core product.

Unlike most reviews that I have seen, I want to focus on how flawed much of the available software actually is, while also trying to give credit where it is due. My comments on Clio are more extensive because I have used it for so long.

1. Clio

Cost:

When I started with Clio, the price was a reasonable $49 per month for attorneys and somewhat less for staff accounts. I have one attorney account, so the price seemed reasonable. If you have several staff members or attorneys, monthly per user pricing can add up fast. Clio recently announced a large price increase which quite suddenly makes it one of the most expensive cloud based legal practice management programs.

Simplicity of use:

Clio's strength lies in its relatively simple interface and ease of use. I don't think that anyone should have too much difficulty diving right into Clio and getting to work. The downside to this easy entry is that Clio is not at all optimized to getting work done quickly. Most tasks take multiple clicks, new matter intake requires entry of data in numerous places to get everything down and getting bills out to clients simply takes forever.

Time and Billing

Clio's billing and payments module is very good at tracking time and generating invoices, but actually sending the invoices to clients and applying payments takes a very long time. It is difficult to split payments among multiple invoices, other than by doing the splitting with a calculator. Amazingly and annoyingly, Clio has no place to enter a check number when an invoice is being paid. Clio's claimed "Quickbooks integration" is simply a download of an IIF file that must be manually imported into Quickbooks. This is okay (though somewhat annoying) for importing invoices, but is useless for importing payments into Quickbooks, as it is not practical to do such manual importation each time a payment arrives. Also it won't bring over the application of a payment to specific invoices.

Xero:

Clio claims that it has integrated with Xero, but almost a year after this announcement this feature is still hardly functional. It will import every invoice you ever created in Clio, with no option to set a start date, and will not import payments, so it is unusable unless you are just starting with Clio. Also, the lack of integration of payments limits its utility. Finally, Xero is pricey as it costs around $30 per month.

Case Management:

Clio's default fields are not sufficient for most practices, but there is a custom fields feature. These fields can be gathered into groups, so that you can add several at once, or make a single default for all matters or contacts. However you cannot set a default group by matter type (I would like separate fields for my real estate matters from those I require for my litigation matters). Custom Fields are also hampered by the inability to generate any reports from data in custom fields. For the most part, Custom Fields are mere support for Clio's document assembly feature, which allows you to use any custom field as a document assembly field. Unfortunately, Clio's method for organizing templates for document assembly is terrible, and the only organization is found by applying a single label and the template name. You then have to search for the correct template whenever you start generating a document.

Document Management:

Clio integrates with Dropbox, Box, Google Drive and NetDocuments to link files. Clio does this well, as it creates a Clio folder that contains a matter for each client and matter you create. This essentially merely creates a link to the documents so that you can see them on the documents tab in Clio. Documents created with the document assembly feature will be stored in Clio's own document management system. This system is quite basic and frankly I haven't used it very much.

Email, Contact and Calendar Integration:

Integration with Google contacts and calendar is excellent and integration with Outlook calendar and contacts is decent, via a small application loaded on your computer (as long as it runs Windows). Clio has an email Dropbox feature to link emails to specific matters, but this has always felt like more effort than it is worth.

Summary:

Overall, Clio is a simple product that is more of a basic project management database with some legal specific nomenclature. It is easy to use, but difficult to utilize in really running a whole practice. I have used Clio for three years, but its limitations have grown more constricting.

2. MyCase

MyCase is an up and coming cloud based practice management product that, like Clio, operates entirely in a web browser, and is quite reasonably priced at $39 per attorney. It has a fairly simple interface that looks somewhat cartoonish to me, but might be to the taste of some others.

While several of the cloud based practice management products have a portal, MyCase is oriented around its portal. I experimented with MyCase for a few days and created matters with real clients and sent them a link to the portal. Most did not really understand the point of a client portal and felt it was more effort than it was worth for dealing with documents. One client said that it was annoying to log in to a separate site to communicate with me. I felt the same way about responding.

One aspect of MyCase that I did not like was how it organized clients and matters. In Clio and other products I have used, each matter has a unique matter number, description and primary client. MyCase has only a description. You can add as many contacts to a matter as you like, but none is the primary client, and, in fact, contacts are designated as clients on a system-wide level. So you cannot link a person as a client in one matter and designate him in another role in a separate matter. Matters also have no automatic distinct numbering though you can designate any number you want and add it to a file.

Outlook integration was done via an Outlook plugin that strangely requires you to have a separate folder for MyCase clients. Similarly, the program creates a separate MyCase calendar. When you are starting with several thousand contacts, this is annoying as you must move the contacts into the MyCase folder before they will sync. MyCase also was somewhat peevish about errors in contact details and would continually warn about them. The Outlook Plugin will also forward emails automatically to your MyCase account, but the emails must then be manually linked to matters, limiting the value of this functionality. Syncing with Outlook was also quite slow.

Time and billing functionality were perfectly fine, though the onscreen timer does not allow you to switch between matters without the prior matter's time being entered, making it hard to use the timer when a phone call interrupts work on another matter. Generating invoices was simple and can be done in one click. You cannot, however, batch email invoices to clients, though you can send batch invoices via the client portal.

MyCase does not work well with non-trust retainers, and its Quickbooks integration cannot handle payments into a non-trust retainer. Quickbooks integration sounds good, but the tech could not get it set up when I first tried and by the time he was able to get it to work, I decided against using MyCase. Also, setting up Quickbooks integration costs a one-time $99 fee.

Document automation was rudimentary and only allowed the choice of one contact per document to be inserted into a document. This makes it difficult to have complete templates. Custom fields can also be used in automation. The custom fields feature is disappointing in that you cannot specify which fields should appear for particular matter types. In fact, all specified custom fields appear at all times for all contacts and all matters, which just seems to crowd the page.

The document management functionality was poor, as it has no integration with any other service and no ability to sync to desktop. There is supposedly an online word processor, but I could not figure out how to activate it.

The best feature of MyCase was its workflows feature that allows you to create predefined lists of tasks and calendar events that you can apply to a matter. This feature has a lot of potential, especially if MyCase takes it further to allow you to add in document automation templates into particular matters at predefined stages. The workflow feature is not yet as powerful as others that I have seen.

In conclusion, MyCase is a work in progress that has some way to go to being a complete product.

3. Amicus Cloud

Amicus Cloud is a product that comes from one of the venerable legal practice management vendors, Gavel and Gown Software. At $35 per user, this product is priced well and does have some potential. Unfortunately, at this time, Amicus Cloud is too buggy to actually use on a daily basis (to be fair, Amicus claims it does not work well with Office 365 exchange servers, so maybe some of the bugs and slow performance are due to my use of Office 365). Amicus offers a 21 day free trial.

Amicus Cloud is designed to integrate with Microsoft Exchange server and directly integrates all calendar, contact, task and email from your exchange server. So far so good. Unfortunately, it is slow, the email client built into the product is simply not a substitute for Outlook. Also, it is terribly slow.

Document assembly features, which are admittedly still in beta, work nicely for email and have several powerful features that are not available in some of the other cloud based products. The problem is that Word templates must be uploaded in HTML format and this unfortunate approach caused a lot of formatting issues in my limited testing. Not maintaining the formatting of documents is a big problem as it kills the timesaving potential of document automation.

Like its desktop counterpart, Amicus Cloud is pretty focused on making sure you don't miss time entries. This functionality works pretty well. Creating bills in a batch was difficult, as Amicus will list all of your matters with open unbilled time, but you have to create the invoices one by one. This is an unfortunate choice, and with Amicus Cloud's general bugginess, it leads to a lot of potential frustration.

Overall, I think Amicus Cloud has a lot of potential, especially as it is one of the cheapest cloud services, but it just is not ready to be used on a day to day basis.

4. Actionstep

The New Zealand import ActionStep is a quite interesting cloud practice management program. Unfortunately, it does not offer a free trial, and they are really only willing to give you a demo with a salesperson. As one can imagine, that demo is canned and looks great. They also want an expensive setup fee of $300, so one cannot really just start using ActionStep. According to the salesperson, this is because ActionStep is tremendously customizable and every implementation will differ. Needless to say, I found this explanation unsatisfying, but the product continued to intrigue me, so I figured out a way to try it without paying the setup fee.

ActionStep claims to be based on a model of preconfigured workflows (the Steps referred to in its name) that allow you to implement standardized tasks, events, documents and emails for each type of matter you handle. This is exactly the type of product I thought I was looking for. Unfortunately, ActionStep doesn't quite deliver on its promise. For one thing, Actionstep comes unconfigured out of the box (though maybe if you pay the setup fee, they will configure it for you? Of course, I am put off by the expensive charge).

I did figure out a way to try ActionStep, as their signup link allows you to create an account and pay the monthly fee. I actually paid them $60 for one month of service to try out the product, which is how intrigued I was by the claimed features.

The best things about ActionStep are that it is quite powerful and very customizable. Unfortunately, they do not set up the product for a law practice out of the box and you have to either find pre made "apps" at the "app store" or build your own from scratch. I tried doing this, but then realized that customizing it would take a long time, and since I was put off by other aspects of the program I gave up.

For one thing, ActionStep expects you handle all documents within ActionStep. It provides the ability to create folders for each matter and allows you to open MS Office documents in Office on your desktop and the changes automatically save back to ActionStep. The problem is that this only works for Office documents. PDF's, which I use almost as often as Word documents, do not have this functionality and must be downloaded and re-uploaded when edited. An Explorer plugin that would allow you to sync your files locally would be a great feature.

ActionStep has an Outlook plugin whose promise is hampered by poor implementation. First, the plugin takes up way too much space in my Outlook email window, compressing the email into a very small window. It also has no way to automatically link emails to a file so each email must be manually linked. Even worse, linking an email does not upload the email to ActionStep. You must affirmatively tell ActionStep to upload the email. The whole process feels very time consuming. Also, there is no mechanism to sync contacts from Outlook or Exchange (or Google, I believe). Calendar does sync perfectly through your Exchange server or Google Apps.

ActionStep allows you to email from within the program, but makes the crazy choice to use POP3 for email so it doesn't stay in sync with email you have read elsewhere. Also, any email you bring in from Outlook will have "COPY" added to the subject line.

ActionStep does not sync with Quickbooks as it has a full general ledger accounting system built in. I have not used ActionStep enough to judge whether it can replace Quickbooks, but that is the intent. Strangely, ActionStep chose to integrate with Xero. I haven't used Xero for any length of time, but I have looked at it in the past and did not think it was worth paying monthly for accounting software.

I have not figured out how to use ActionStep's document automation functionality, but if it is like the rest of the program, it has a lot of potential that might or might not be fulfilled.

I found time and billing in ActionStep to be somewhat cumbersome, though you can automatically create time entries from most activities. Bill creation is relatively simple, but it does take a number of steps. Like everything else in ActionStep, your invoices are inserted into a customizable template, but to get invoices looking like I want them will take some effort.

ActionStep shows a lot of promise, but in the end I think it is too complex to use and some features feel under-baked.

5. Merus Case

Somehow I found out about a product called Merus Case. I am not sure how I found them, as they don't seem to advertise. They are priced at $40 per user for month to month. After a short demo, the salesperson provided me with a trial account.

I spent a little time trying out Merus Case, which has a lot of potential as well, but ultimately chose not to invest a lot of time trying it out. Like ActionStep, it wants you to move all of your work inside its four walls, but I am not sure I am prepared to do that. It has the ability to open office documents on your desktop and then have the revisions saved back to the system, but again cannot do this with PDF's. It also has no accounting integration. Email integration is done by setting up your email account with IMAP or POP and then emailing from within the system.

Merus Case has a nice interface and is customized for certain specific practice areas (primarily worker's comp in California). I think that it would be greatly improved if they focused on making features for more generalized practice. Merus Case has a great interface, is speedy and entirely in the cloud. It just doesn't seem ready for use in my practice.

Time and billing is more task oriented than a straight timer, which is the approach that I prefer. Also, despite the email integration, I could not see a method for emailing my invoices directly from the software. One thing I hate to do is download invoices and then have to separately email them out.

6. Firm Central

Unfortunately, trying to get access to Firm Central has been rather difficult. I have asked my Westlaw rep several times, and still nothing. Firm Central appears, from its website and videos, to be a decent first start that will need more features to be really useful.

It has a pretty nice looking interface (similar to Westlaw Next) that seems to be easy to navigate. Firm Central allows for custom fields, but I am unclear on whether there is any document assembly or automation feature built in, or if you have to subscribe to another West product to use it. Time and billing is outsourced to Ebillity, but from what I can tell, the time and billing is fully integrated once you pay for it. I have not been able to see it in action so I will withhold judgment.

Firm Central does have two interesting features that I like a lot. One, it integrates with Outlook so that once you create a matter it creates an Outlook folder for that matter and automatically uploads whatever you drag into that folder into Firm Central. This seems to be the right approach to Outlook integration (and the only comparable Outlook functionality I have seen is in the pricey Prolaw which is also from Thompson Reuters).

Similarly, for documents, Firm Central has a Dropbox like plugin that gives you local access to documents from your computer, organized by matter. This also is a sensible way to approach dealing with documents. I will update this section once I get an opportunity to try Firm Central myself.

7. Lexis Firm Manager

Simply stay away, I couldn't get it to work at all.

8. HoudiniESQ

This product is a hybrid cloud/desktop product that works in a web browser, but either needs to be installed locally or hosted for $64 a month. It is attractive for solos, as it is free for one license.

Houdini has a lot of features built in, but it has a strange interface that is not especially user friendly. I intend to try testing it out soon and will update this section with my in depth thoughts.

9. Rocket Matter

I haven't tried Rocket Matter this time around, but I had a free trial around a year ago. I remember strongly disliking Rocket Matter, but I cannot recall any specific details other than not liking the interface. Also, the fact that you have to beg for a free trial and give a credit card, was unappealing.

What about the legacy desktop programs?

The various programs that work from your desktop (Abacus, Time Matters, PCLaw, Prolaw, Amicus) are not designed like modern web based cloud programs. They need to have a local server and have limited remote access.

They do all seem to have significantly greater functionality than the cloud based programs that are all trying to catch up. These programs also have significant upfront cost (Abacus is willing to license their software on a monthly basis and is actually competitive to most cloud programs, though).

I am expecting to receive a copy of Amicus Premium 2014 to test; hopefully, I can get it up and running. These programs all have complicated databases that need to be set up as a server and I have been told that they expect people to pay them for setup. I will update with a full review of Amicus Premium should I get it running.

Prolaw was quite expensive, though it looks to have a lot of features meant for a larger firm. I have not seen Time Matters or PCLaw, though Lexis Nexis has promised to call to set up a time for a demo (I prefer actually getting a chance to use a product without the salesperson).

Conclusion

There are no perfect products out there, though I cannot be sure as to why no one has really built something that is truly easy to use and has the powerful features of legacy desktop programs built into a web browser. Beware companies that do not want to give you the opportunity to use their software on your own computer at your own pace. They always seem to be hiding something. There are truly great opportunities for a good product to eat this market up if someone would just get out there and build it.