

# CHOOSING LEGAL SOFTWARE SOLUTIONS

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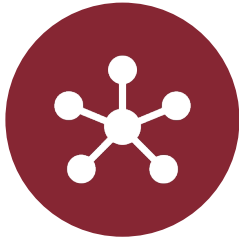
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# AGENDA



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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