

# The Rocket Matter Guide to Legal Practice Management Software

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Family Law Edition



rocket matter

# Acknowledgements

This guide would not be possible without the contribution of Jenny R. Stevens, a Rocket Matter user, who shared her story of running a family law practice.

Jenny is an attorney, Guardian ad Litem, and Certified Family Court Mediator at the [Stevens Firm, P.A., Family Law Center](#) in South Carolina. She finds her work representing children in private custody litigation to be some of the most rewarding work in the practice of law.

You can find her on Twitter at [@MrsMacLawyer](#).

Thanks, Jenny!

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## Introduction

The decision to practice family law can be one of the most challenging and fulfilling choices an attorney can make. Whether you're in a solo, small, or mid-sized firm, you'll be spending time helping clients navigate through one of the most difficult periods in their lives.

If you're an exclusive family law practitioner or are considering adding family law to your current mix of practice area specialties, there are certain challenges and workflow complexities you'll encounter on a regular basis. In addition to managing difficult situations and emotional clients, a barrage of emails and phone calls, and a robust court schedule, you'll also have to be adept at multi-tasking, prioritizing, and juggling multiple cases. Family law practitioners must possess excellent organizational skills and always make sure that they and their staff are on the same page.

Leveraging technology—specifically cloud-based practice management software—helps tremendously and provides a competitive advantage. By automating client intake, records management, document assembly and storage, as well as billing, invoicing and more, a leading practice management system can help a firm stay organized and become more efficient in critical aspects of their business.

This guide will help outline some of the daily challenges and workflow issues that family law practitioners face, and it will provide real-world solutions to issues ranging from intake to invoicing. The content in this eBook is based on our work with thousands of law firms worldwide, and we hope it will help you run a better, more efficient, more successful family law practice.



## A Typical Day at the Firm

Whether you're a small firm, large firm, or a solo practitioner, your day is filled with a variety of challenges and tasks. In between meeting with your staff and reviewing paperwork for new cases, you may also have to prepare for courtroom appearances and file notices, motions, and pleadings.

Imagine if you were able to access all of the files, documents and emails you needed no matter where you were located. Imagine if all of your firm's individual or collaborative casework was organized by client and matter, and you could instantly retrieve them from any device. Lastly, imagine that you could access all of your contacts, calendar events, tasks, time tracking, and billing and invoicing functionality through the same system.

These benefits are at the heart of a good cloud-based practice management solution like Rocket Matter, and they can have an enormous impact on your daily workflow as detailed in this chapter.

**Benefits for Attorneys:**

- Rocket Matter helps reduce administrative overhead by up to 40% by reducing the time it takes to complete some of the most common tasks such as filing and document assembly.
- Attorneys capture up to 30% more overall revenue thanks to our powerful time and billing features. Rocket Matter offers nine easy ways to capture time as you work, and provides multiple timers to help balance several cases simultaneously.
- Rocket Matter helps you better communicate with your clients as it gives you instant access to every case and file. You can also share files safely and securely through our client portal.
- You can immediately access any document, case, or file from court (or anywhere!) on any device.
- All employees can access the same documents and files, making collaborative work simple. You can review and edit documents and then easily share them with others.
- Rocket Matter makes trial preparation a breeze: You can access all of your case files by using our powerful global search functionality, and you can use our task management system to make sure you don't miss a thing.

**Benefits for Staff Members:**

- You can not only receive messages through Rocket Matter, you can also capture time and bill as you process them.
- Rocket Matter's simple yet sophisticated calendar allows you to easily schedule appointments, meetings with clients, and court dates.
- You can instantly create new documents with our document assembly feature, and you can store them in our powerful foldering system and organize them by matter.
- Rocket Matter provides unlimited storage capacity for all of your files, which you can access from any location on any device.





## Client Intake and Adding New Matter

When you're running a busy and growing family law practice, having a process in place that quickly and easily brings new clients on board is a must. Most firms make a conscientious effort to follow up with new clients and to process their incoming paperwork efficiently, but the real key to intake success is automation.

Handling new clients the manual, old-fashioned way can result in administrative delays and errors, as well as difficulty in processing paperwork. This ineffective way of onboarding new clients can lead to their dissatisfaction which, in turn, might translate to them moving on to a competitor.

Rocket Matter Intake can streamline the process by helping to immediately identify and source new leads and by enabling clients to fill out their paperwork quickly and efficiently online. It also allows you to quickly run a conflicts check, manage all your new inbound contacts, and provide task management and reminder capabilities including:



- **Potential client registration:** The potential client is entered into Rocket Matter with an appointment and a time to meet with an attorney.
- **Run conflict checks:** You can use Rocket Matter's global search bar to type in the potential client's name (you can also search by phone number) to make sure that there are no potential conflicts—for instance, you can determine whether you’ve represented one of their relatives or whether the potential client may have been a defendant in another matter that may preclude your firm from representation.
- **Link former clients to new matters:** If a client has worked with you previously, you can pull their old contact information, update any information you already have in the system, and link that contact to a new matter.
- **Easily create new matters directly from the “Add New Matter” screens:** Link a potential client's information to a new matter directly from the dashboard and add the necessary information in Rocket Matter immediately.

### Add New Matter

**Required Fields**

<b>Client *</b> <input type="text" value="John Smith"/>	<b>Matter Name *</b> <input type="text" value="John Smith vs. The State of Florida"/>	<b>Open Date *</b> <input type="text" value="08/05/2016"/>
------------------------------------------------------------	------------------------------------------------------------------------------------------	---------------------------------------------------------------

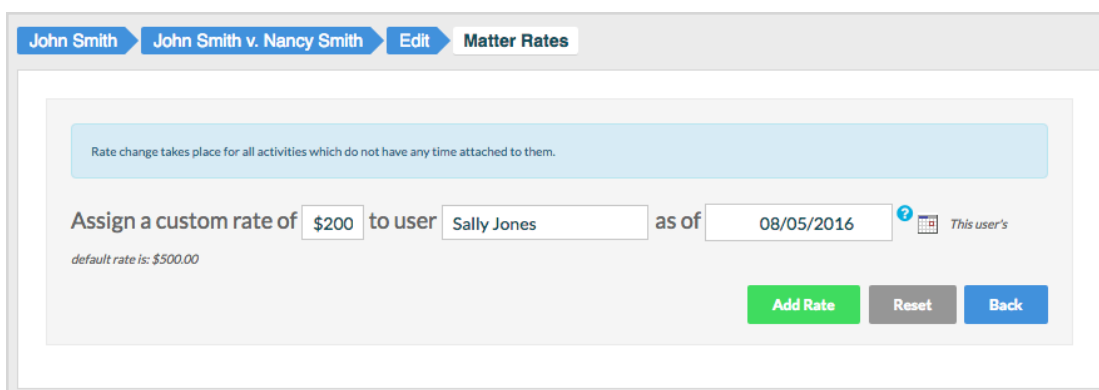
  

<b>Billing Method</b> <input checked="" type="radio"/> Bill on an hourly basis <input type="radio"/> Bill on a contingency basis <input type="radio"/> There is a flat fee of	<b>Statute of Limitations</b> <input checked="" type="radio"/> Does not expire <input type="radio"/> Expires on	<b>Who can view this matter?</b> <input checked="" type="radio"/> Everyone <input type="radio"/> Just me <input type="radio"/> The following users..
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------


**Additional Fields**

- **Assign matters based on primary attorney:** From the "Add New Matter" screen, you can assign a Primary attorney as you're creating that matter, or assign one later from the matter dashboard. This is helpful for running reports and batch billing by attorney.
- **Set custom rates for specific matters:** (i.e. litigation cases; GAL cases and mediation cases all have different rates): Each attorney can have a custom standard that they're able to set in their Rocket Matter profile, and Rocket Matter users can also assign custom rates for individual matters, and bill that hourly rate from that day forward. You can also use date ranges to apply those custom billing rates to matters.



John Smith > John Smith v. Nancy Smith > Edit > Matter Rates

Rate change takes place for all activities which do not have any time attached to them.

Assign a custom rate of  to user  as of   This user's

default rate is: \$500.00

- **New Rocket Matter workflows and matter templates:** Matter templates are essentially checklists you would like your staff to follow when working on a case. These matter templates can help with managing your workflow, correspondence, deadlines, events, tasks, and sub-tasks (based on timelines or milestones) that are fairly standard across a matter type that comes through your office. The templates are built, customized, and modified by your firm, so the workflows will match how your firm does business.



## Tracking and Billing

We've talked to thousands of law firms across the country, and no two businesses handle billing the same exact way.

If you're in a mid-sized firm, all of the attorneys at your firm may not be doing the same thing or even practicing in the same area. If you're a solo, you might have to handle everything.

One thing most firms have in common is the need to accurately capture and track their time. Consider how you track your time currently: Do you have the ability to start and stop multiple timers, allowing you to juggle several matters throughout the day? Do you have the ability to record expenses and time separately? Are you able to capture time for emails, tasks, documents and messages? Can you currently capture time from anywhere, on any device?

Rocket Matter can do all that and more. Here's how we help busy legal professionals stay on top of their time and billing:

- **Bill directly from calendar entries:**

This is one of the most cost-effective, time-saving measures you can implement in your billing practices. When you schedule an event, just check the "bill for time" box, and you can adjust the time it actually took you to complete that event and it will be billed directly to that matter for the time you attended.

**Calendar**

**Event Details**

Event ☐ flag  
Meeting with Joh Smith

from 08/05/2016 at  Help me calculate the date...

to 08/05/2016 at

Enter a client or matter  
John Smith : John Smith v. Nancy Smith

Location  
Ruth Chris

Notes  
Lunch meeting to discuss details of case

**Attendees** [check availability](#)

Event Owner	Bill	Non-Billable	Availability	Billing Date
Sally Jones	<input checked="" type="checkbox"/>	<input type="checkbox"/>		08/05/2016
Attendees	<input type="checkbox"/>	<input type="checkbox"/>		

[+ add another](#)

OK Cancel

- **Bill for e-mail:** With our Google mail and Outlook integration, you can attach emails to a matter, and you have the option to bill the client directly from that email.

- **Run timers on activities to bill in real time:**

Single timers and multiple timers can be useful for when you are working on a single document and get interrupted by a phone call for another matter. These features help you to capture time while you work as they run in the background so you don't forget what time you started. Then, you can stop the timer when you're done, filling in the description of the work you did for the matter.

**Run timers on activities to bill in real time**

[+ Add New](#) [\\$](#) [🕒](#)

<a href="#">▶</a>	00:00:12	0.00	Units	...
<a href="#">▶</a>	00:00:06	0.00	Units	...
<a href="#">▶</a>	261:02:19	261.0	Units	...

- **Enter time easily using guided forms:** When it comes time to run invoices, you won't miss details with this feature. From this screen, you can set your billing rates or change the person you're billing time for (primary attorney or staff), and the rates will automatically change to reflect that.

John Smith

John Smith v. Nancy Smith

Billing

Add Expense or Time

### Time Expense Details

Description

Legal Research

multirow

Client : Matter

John Smith : John Smith v. Nancy Smith

Billing Date

8/5/2016

### Expense Type

☒ Time

Bill by

Sam Hill

Billing rate

\$10.00 /hr

Billable units

Total 0

☐ Cost

Amount

### Billing Options

☐ Non-Billable

☐ Do not charge. ?

OK

OK, Add Another

Cancel

- **Dashboard tally of time billed (day, week, month):** Each user can see this easily from their dashboard.
- **Easily adjust time entries:** In the event of user error or a typo, you can simply click and correct the mistake before running an invoice.
- **Partners have real time data on productivity of staff:** With administrative access, you have a firm-wide view of the time users spend on billable activity.



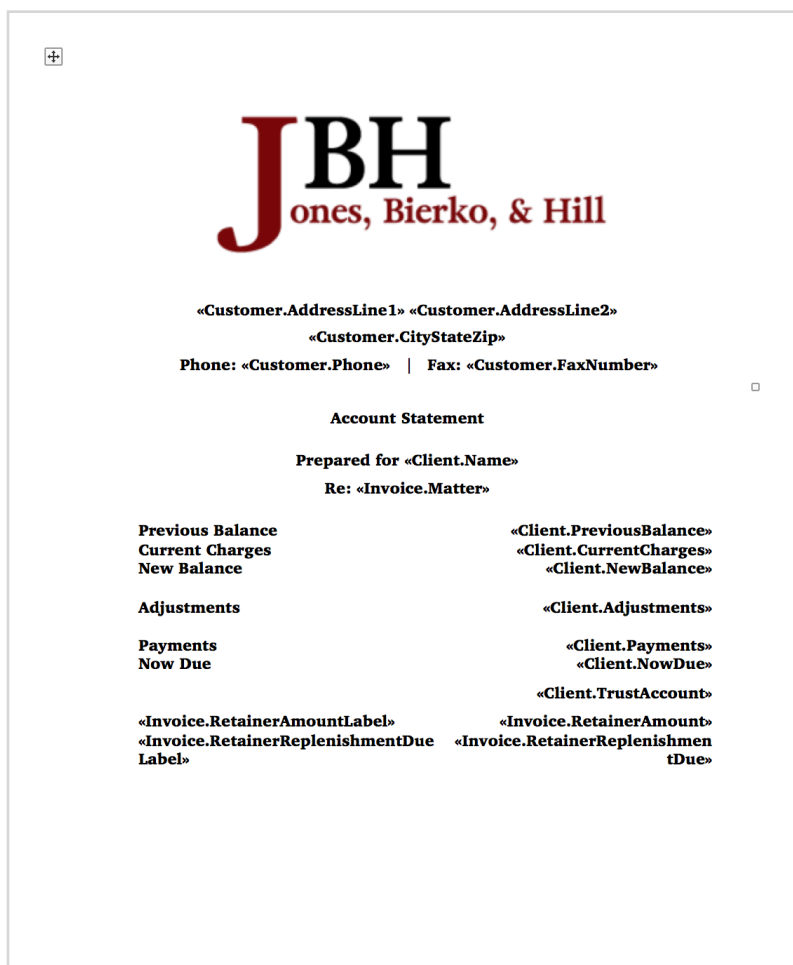
## Invoicing Clients

If you're like many firms, you're probably well aware that running monthly invoices can be a logistical nightmare. Over the years, we've heard from many firms that the whole process often takes a full day each month. Generating your batch billing and reviewing each invoice to make sure all the manually recorded expenses and billable items are correct takes a lot of time. What's more, updating your system or spreadsheets become daunting tasks.

In addition, your clients want detailed, professional looking invoices. Generating descriptive, timely, accurate invoices quickly and delivering them electronically is another challenge that firms face—a challenge that takes time.

What if you could cut the time it takes to do your monthly billing down to only 30 minutes per month? What if you could generate individual invoices in minutes? It's possible if you're using the right practice management system. For instance, here's what Rocket Matter can do:

- **Custom invoice templates:** You can design how your invoice looks with a custom logo and custom data fields that may be important for your clients. Rocket Matter allows you to assign custom invoices on the matter level as well whenever a client or case needs a unique format.



JBH  
Jones, Bierko, & Hill

«Customer.AddressLine1» «Customer.AddressLine2»  
«Customer.CityStateZip»  
Phone: «Customer.Phone» | Fax: «Customer.FaxNumber»

Account Statement

Prepared for «Client.Name»  
Re: «Invoice.Matter»

Previous Balance	«Client.PreviousBalance»
Current Charges	«Client.CurrentCharges»
New Balance	«Client.NewBalance»
Adjustments	«Client.Adjustments»
Payments	«Client.Payments»
Now Due	«Client.NowDue»
	«Client.TrustAccount»
«Invoice.RetainerAmountLabel»	«Invoice.RetainerAmount»
«Invoice.RetainerReplenishmentDue Label»	«Invoice.RetainerReplenishmentDue»

- **Evergreen trust retainers:** When a client's trust account drops below a threshold amount, invoices will show clients the amount they need to pay to get back to that bare minimum trust balance and stay in good standing.



- **Custom cover letters:** This is great for special cases. The cover letter serves as an introduction to the invoice clients are about to view. You can also use it to summarize any work done or instructions for your client regarding the bill.
- **Batch-billing and pre-bills:** When it's time to bill, you can run a batch of bills for any unbilled activity, and you can see a pre-bill snapshot before finalizing any invoices.

**Batch Billing Options**

Which matters owe more than

\$

from  to

For user

Enter the name of the USER. Leave blank for ALL.

For Clients

**Owe, meaning**  
☒ current charges  
☒ total due

**Please Include**  
☒ hourly matters and/or  
☐ flat fee matters and/or  
☐ contingency matters

Batch Billing enables you to quickly create pre-bills or invoices for all eligible matters. For more instructions on using batch billing, [view the following tutorial](#) from the training video catalog on our [support site](#).



## End of the Month Reporting

The right practice management software can instantly provide detailed reports that break down your data by client and matter. Reviewing these reports can help you better understand how you're using your time and how productive your timekeepers are.

Advanced reporting, however, goes beyond the individual and looks at the firm as a whole. It tells you the answers to such questions as: Which clients and matters are most profitable? What are your current allocation percentages? What is your current collections realization rate? If you can't answer these questions each month, you don't have a full grasp on your firm's financials.

The good news is that easy-to-access reporting is the backbone of the Rocket Matter platform. The software helps you organize your most important data into instantly retrievable reports from one centralized menu. You can search by topics such as:

- Billable activity for the entire team
- Outstanding balances owed by clients
- Trust account reconciliations
- Firm case load
- Matters with outstanding tasks
- Goal-setting and incentive/bonus plans based on reports
- Evergreen balance report for open matters

Rocket Matter can also generate reports for origination, productivity by user, billable activity per user, and the ability to see the amount of time staff worked each day over a specific time period.

Settings
Reports

### Report Listing

**I want to see Billable Activity by User(s)**  
 Report showing what users billed during a specified period, across matters. The report includes a summary of billing **user**, **clients**, **matters**, **billable activity type**, **bill date**, **billing description** along with amount of time billed.
   
[Run Report](#)

**I want to see what the firm is owed**  
 Aged Accounts Receivable Report that includes a summary of **clients** with their **contact phone number**, **matters**, and **aggregate** amounts of unpaid invoices across different time periods.
   
[Run Report](#)

**I want to see what the firm has been paid**  
 Report showing payments made to the firm that includes a summary of **clients**, **matters**, **date**, **description** and **amount of payments**.
   
[Run Report](#)

**I want to see a list of all matters**  
 Report providing a list of all **open or completed matters**, along with the **date of the last billable event** that occurred for that matter.
   
[Run Report](#)

**I want to see a list of all invoices processed over a specified time period.**  
 Report providing a list of all **invoices processed**, along with the **invoice or batch number**, **date**, **costs and fees**, and **invoice total**.
   
[Run Report](#)

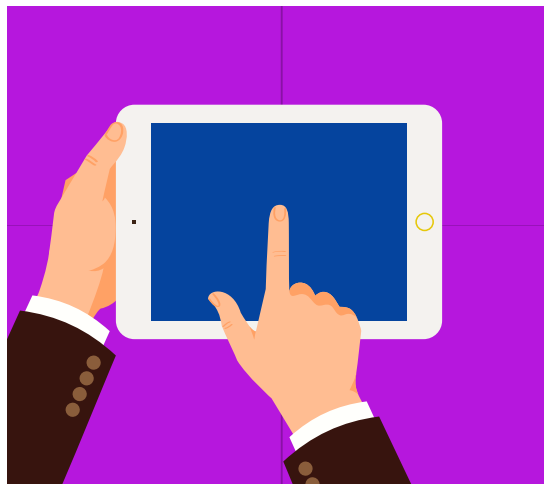
**I want to see a list of matters with budgets**  
 Report showing which matters are **closest to reaching their budgets**.
   
[Run Report](#)

**I want to see all of my trust account transactions**  
 Allows you select a date range and see all of your firm's **trust account transactions** across all clients, ordered by date
   
[Run Report](#)

**I want to see all of my trust transactions by client**  
 Report showing trust transaction on a client by client basis, including **date**, **type**, **description**, **amount**, and a **running balance**
  
[Run Report](#)

**I want to see a list of all tasks in open matters**  
 Report showing all tasks on open matters, including **date**, **description**, **created by user**, **assigned to user**, and **billable units**.
   
[Run Report](#)

**I want to see all payments towards all invoices**  
 Report showing payments made to all of the firm's invoices. It includes the **client**, **matter**, **payment date**, **payment amount**, etc.
   
[Run Report](#)



## Conclusion

The practice of family law often involves a whole lot of stress, and practitioners face a challenging combination of emotional and agitated clients, mounds of administrative work, and frequent court appearances. A good practice management system - like Rocket Matter - helps you to run your office better, automate administrative tasks, and streamline your workflow. It also enhances the relationship with your clients by providing transparent time tracking, billing and invoicing, insightful and comprehensive reporting, and improved communication.

Together, the functionalities and processes that legal practice management software provides, go a long way towards reducing stress and administrative burden, and transforming your family law practice - in the office, in court, and on the go.



## About Rocket Matter

Rocket Matter is the pioneering cloud-based practice management and time and legal billing application for solo and small to mid-sized law firms. Our aim is to help law firms run a better business by being more efficient, productive, and ultimately more profitable. The powerful, intuitive interface allows lawyers to measure their firm's performance, organize matters, communicate with clients, quickly capture time, and makes billing and invoicing a breeze.

Trusted by thousands of law firms worldwide, Rocket Matter offers an all-in-one legal practice management platform with the most powerful easy-to-use time and billing software on the market. It helps firms increase revenues by 20%. When law firms want to make more money, go paperless, or increase confidence in their trust accounting, Rocket Matter helps them achieve those goals.

Please enjoy this guide and become part of our cutting-edge community on Facebook, Twitter, and Legal Productivity blog.

