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and a Thriving One

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Mary Girsch-Bock • Apr. 17, 2015



Good practice management software can often mean the difference between a loosely-organized firm and a practice that is thriving, growing and more profitable. While a firm can have the best and the brightest employees on staff, if they're not

given the tools to be successful, their likelihood of success decreases. Even the best

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functionality, with built in timers, for employees to utilize. They also offer management a good snapshot at employee productivity, while helping schedule employees efficiently for upcoming jobs.

In this issue, when reviewing these products, we reviewed programs based on six different areas. They include:

Basic System Functions – This area includes a review of the user interface as well as a review of other applications and modules that integrate with the core product. We also note if the product is available on a web or Cloud-based platform, or only as an installed product on a local server. This is an important area, particularly for firms that need the flexibility that an Internet accessible product offers.

Time Management – This is the core of the practice management system. Here we take a look at the various means used to capture time, and how that information is conveyed. Does the product utilize a timesheet entry system or are there system timers available? Can users utilize more than one timer simultaneously? Does the product also offer employee time tracking for vacation, sick and comp time?

Invoicing Functions – Here we looked at how easy it was for users to process invoices. Can the invoices be created directly from the time entry screen? Could invoices be emailed directly to clients? Are the invoices customizable?

Management Features – Here we took a look at some of the features that would likely be used by firm managers. This included things like the availability of dashboards. We also looked at scheduling capabilities, where both managers and employees can track their time and projects more efficiently? Does the system have good reporting options and analytics capability? What about productivity tools such as document management capability?

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Whatever the needs of your firm; whether you're looking to implement practice management software for the first time, or are interested in upgrading your current application, the products included in this review deserve some consideration.

Firm Management • Technology

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