



## **What to Look for in a New Time and Billing System**

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Searching for a new Time and Billing system in a law firm can be a very stressful experience. Many administrators have never had to organize a search, those that have, may not have been faced with the uncertainties that exist between products and vendors today. Internal pressure can easily derail the process unless there is a well-designed plan. This article will identify 7 focal points that will help a firm choose the time and billing system that will be right for them.

What to look for:

1. **Which vendors should I talk to?** Only look at vendors that specialize in firms your size. The "one size fits all" philosophy seldom does. If you are a mid-to- large sized firm, you may not need the complexity and cost of a very large firm system. At the same time if you are 25-40 attorney firm with more sophisticated needs then a small firm product won't fit either. The vendor should be able to provide a full system cost estimate over the phone and avoiding sticker shock later. Look for vendors that regularly attend tradeshow and are active in legal associations like ALA.
2. **What technology should we implement?** You can't go wrong with prevalent standards, in this case a product built on Microsoft® SQL Server 2000/2005 technology will be a safe bet and affordable for all but very small firms. The price of Microsoft® licensing is no longer a barrier. Systems built on non-standard "SQL Server knock-off's" should be avoided; go for the real thing. How much of the software is already Microsoft® .Net certified? This is becoming a critical issue as Microsoft® continues to integrate this technology into all of its product lines and IT professionals are starting to see the reduced cost of ownership associated with .Net.
3. **How fully integrated are the modules?** Today you may not need that collections or marketing module but when you do, the vendor should have it already available in the standard system. Be wary of vendors that require 3<sup>rd</sup> party integration for the common modules you might need. Involving multiple vendors and products increases costs, requires additional training and introduces potential support problems. A fully-integrated product from a single vendor is a safer bet.
4. **Can I get my reports and at what cost?** The biggest single complaint firms have with their systems is the inability to get that special report without custom programming costs or knowing Crystal® Report Writer. Have you ever tried to learn that "industry standard" report writer? Make sure your vendor has an integrated Business Intelligence module that can provide even a novice user the ability to drag and drop data items onto a screen to produce simple or complex reports. What use to be expensive and frustrating is now an everyday analysis tool.
5. **Can I get custom bill formats and at what cost?** Ask the vendors exactly how you can get a custom bill format and what will it cost. Show all your bill formats to the vendor and get assurances that the standard system have these available. Some vendors have built in "bill designing" capabilities that allow you to drag-and-drop items onto a "page maker" type screen and you can design all your own formats.

6. **Specifically how will the new system improve our profitability and cash flow?** Don't settle for vague generic answers. Systems today have tools that allow the firm to analyze profitability at the client, matter and attorney level. Check out the collections module and assure yourself that it can be implemented by the firm to produce results not just activity. Talk to references and find out how the proposed systems actually make money. This will help justify the purchase.
7. **Can the product be easily used from remote locations?** Firms with smaller remote offices often have a challenge providing software functionality to those users. While Citrix is a logical choice, the initial upfront cost can be steep. Check to insure that the new system is designed to operate on a standard T-1 phone line WAN in addition to being Citrix "friendly". Are modules like time and expense entry available in a web browser format for mobile attorneys?

No matter which system you choose you'll need to form a tight bond with the chosen vendor. Instead of choosing a "vendor" choose a **PARTNER**, you'll have to live with your decision for 7-10 years. Look beyond the screens and make sure you'll be happy with the actual people involved.

#### **About the Author**

Jim Hammond, president, [RainMaker Software Inc.](http://RainMaker Software Inc.), has more than 25 years of law firm software experience. RainMaker provides mid-to-large sized law firms with proven, practical and progressive Financial Management, Practice Management, Business Intelligence and Case/Matter Management software. He can be reached at [jhammond@rainmakerlegal.com](mailto:jhammond@rainmakerlegal.com).