

# PCLaw®

## Law Firm Practice Management Case Study

LANCE M. PRITIKIN

“PCLaw® improves my operational efficiency substantially, allowing me to give my clients more of my time at the best possible value.”

Lance Pritikin, Attorney and Owner  
Law Offices of Lance M. Pritikin

Attorney Lance Pritikin has his own way of doing things

He showed it by starting a solo patent law practice while continuing a valuable relationship with his former firm in an of counsel capacity.

Then he showed it again by putting his engineering background to work, selecting software that enabled him to efficiently manage most key aspects of his operation himself.

In terms of comprehensive features and usability, one particular software tool was a clear choice: PCLaw® client, matter, billing and accounting software.

“I looked at a number of solutions and decided on PCLaw,” Mr. Pritikin said. “Ultimately, I wanted an accounting system that helped maximize my productivity and minimize my overhead. That approach benefits me and my clients, so everyone wins. After analyzing my needs, PCLaw stood out as the best solution.”

“I thought it was going to be a good program and it turned out even better than I thought.”

Years of experience working for other firms gave Mr. Pritikin the knowledge he needed to be successful.

“I knew I needed a good program that would cover timekeeping, generating invoices, accounting, provide an accounting database that matched my physical checkbooks and checking accounts, and of course, ensure accurate trust accounting.”



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*“It’s just very impressive that the system was adaptable to what I conceived that I wanted it to do. Using PCLaw, I haven’t encountered a single scenario where I wished I could perform a particular task, but couldn’t.”*

— Lance Pritikin | Attorney and Owner | Law Offices of Lance M. Pritikin

It also gave him a good idea about what he definitely didn’t want, which was the accounting system used by many of the firms he had worked with previously.

“A lot of these firms have become too comfortable with the software they have been using for decades,” he said. “And the invoices are often difficult to read or lack useful information. The client ends up confused about their bill, and guiding them through that confusion eats up everyone’s valuable time.

“Attorneys starting their own practice should recognize the importance of producing invoices that help the client understand the value you have delivered to them. At the start of my practice, I created my invoice template very quickly using PCLaw. Now, with a few mouse clicks, the program generates clear, readable invoices very efficiently. I don’t even have to think about it.”

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“Just like that I generate these beautiful invoices that I’ve never had a client fail to pay.”

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Every small-firm owner knows that one of the greatest challenges to staying in business is getting paid. And it doesn’t help that so many small firms follow the large-firm lead of billing just once a month, or even less frequently, often allowing tasks to go unbilled for months. Not so the Law Offices of Lance M. Pritikin.

“I like to send out an invoice as soon as I complete a task,” Mr. Pritikin says. “I adopted the model of some of my foreign patent associates. They send an invoice once they complete a task, regardless of when during the month they completed that task.

“I tried that, and it worked very well for me and my clients. And with PCLaw, it really didn’t require any changes on my part.

“If I complete a client’s patent application at the beginning of the month, I don’t want to wait until the end of the month to send out the invoice.

“I find that clients are more content to pay invoices they receive upon the delivery of my services, since that is when they typically perceive the most value. As a result, I also tend to receive payments sooner, and minimize prolonged accounts receivable. So it’s a win-win all around.”

Of course, billing more often requires an accounting system that more efficiently captures every billable hour, expense and disbursement without causing an interruption to Mr. Pritikin’s legal work.

Once again, PCLaw gets the job done.

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“Snap, generate the bill, we’re done.”

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The easier it is to bill, the faster invoices can get out, the faster invoices can get paid. And with PCLaw, Mr. Pritikin has easy billing covered.

“Patent work requires highly nuanced technical and legal analysis, and a task can spread across several days or weeks. Once a task is complete, I just tell the program to automatically scoop everything in, all the unbilled fees and disbursements that have occurred on a matter up to today Snap, I generate the pre-bill, looks good, snap, generate the bill, send it out in the form of a PDF, done deal. Then I’m on to my next task.”

It certainly doesn’t hurt his practice when PCLaw helps Mr. Pritikin find a few extra dollars here and there, either. “The system doesn’t forget if there is an unbilled fee from two months ago. I know as long as my time gets entered into PCLaw, it’s going to get pulled into that invoice when it’s generated. That allows me to stay organized and focus more of my time and energy on my client’s concerns, rather than my billing and accounting concerns.

Another task that Mr. Pritikin relies on PCLaw for is timekeeping.

“Lawyers have to come up with an efficient system to enter their time, because we want to move from one task to the next. So if we get off the phone with somebody, we just want to get the time entered quickly and move on.

“With PCLaw, you click on ‘Timesheet’ and you do it. It takes me 30 seconds to open the program and enter my time. And so I definitely use the program for timekeeping.”

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“It’s hard to get in trouble with this program because it doesn’t let you.”

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Maintaining accurate databases is crucial for any type of business. Fortunately, it’s not something Mr. Pritikin has to worry about. Not with PCLaw software.

“I’ve dealt with database programs before that screw up. Something goes wrong and you’re frozen because you don’t want to mess anything else up.

“PCLaw is very stable. And if I try to do something that isn’t quite right, it will not let me do that. “If I try to move money a certain way that I think is right and it’s not technically appropriate or the numbers are off, it’ll let me know that immediately.

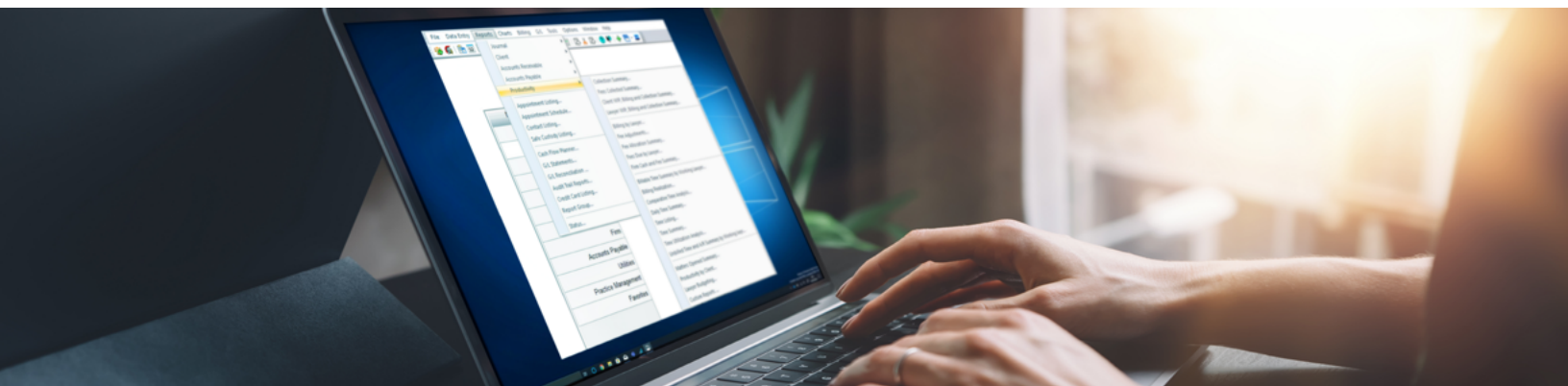
“Confidence is important. When you’re operating your own infrastructure, you want to go about your day and not worry about potential problems with your accounting system.

“Even if you interface with that infrastructure five minutes a day, some tools are critical to the business. You don’t want to go through your day worrying that your database might be unstable. That can wreak havoc. If something goes wrong, that could take months to figure out and completely rebuild the database.

“So just the confidence I have that it does what I need it to do, when I need it to do it, and it’s a stable platform, and I can go about my business knowing that I can rely on that system... That’s probably, overall, the most important thing.”

“Moreover, any time a client needs a trust account ledger, or a ledger of fees and costs relating to a particular matter under my care, I can use PCLaw to generate an accurate, comprehensive report for them within seconds. This

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allows me to be highly responsive to my clients from an accounting perspective as well.”

Making any kind of recommendation—whether it’s for a person seeking employment, or in this case, for new back-office software—requires a lot of faith on the part of the person making that recommendation.

Yet Mr. Pritikin has no hesitation recommending PCLaw to almost anyone who will take the time to listen, including some firms he has worked with in the past.

“This is the one tool that I probably talk about with people more than any other tool.

“I was at the National Association of Patent Practitioners’ annual conference in Denver a while back. And when solo and small practitioners sit around, we exchange ideas. The first thing I bring up is PCLaw.

“And pretty much everyone within my network that’s thinking about starting their own practice, I just tell them, don’t waste your time with anything else. Get PCLaw.

“I consider PCLaw to be an essential component of my law practice infrastructure.

“It’s just very impressive that the system was adaptable to what I conceived that I wanted it to do. Using PCLaw, I haven’t encountered a single scenario where I wished I could perform a particular task, but couldn’t.

“It’s a very well-thought-out system, very efficient to use.”

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“Between you, me and the fence post, I keep telling a colleague they should look into PCLaw.”



## Case Study Summary



### LANCE PRITIKIN

Attorney and Owner  
Law Offices of Lance  
M. Pritikin

#### CUSTOMER PROFILE:

Los Angeles attorney Lance Pritikin transitioned to an of counsel position with his former firm in order to start his solo practice specializing in intellectual property and technology causes. A former lead spacecraft engineer, he uses his broad engineering and business leadership background to help his clients with patent cases, IP due diligence and technical design consulting.

#### BUSINESS SITUATION:

Having worked with many firms using what he considered dated back-office billing and accounting software and processes, Mr. Pritikin's goal was to keep his solo firm truly solo. Rather than bringing in additional people to take care of billing and accounting, he looked for software that would make it easy for him to take care of such tasks himself, without interrupting his legal work. "I knew I needed a good program that would cover timekeeping, generating invoices, accounting, provide an accounting database that matched my physical checkbooks and checking accounts, and of course, ensure accurate trust accounting."

#### SOLUTION:

"I looked at a number of solutions and decided on PCLaw," said Mr. Pritikin. "I thought it was going to be a good program and it turned out even better than I thought." One of Mr. Pritikin's concerns that led him to PCLaw was what he considered the "disorganized-looking" invoices generated by the old-style legal software he had encountered at many other firms. According to him, "At the start of my practice, I created my invoice template very quickly using PCLaw. Now, with a few mouse clicks, the program generates -clear, readable invoices very efficiently." Mr. Pritikin also appreciates that the time and expenses he puts into PCLaw software automatically show up on his invoices too. "The system doesn't forget if there is an unbilled fee from two months ago. I know as long as my time gets entered into PCLaw, it's going to get pulled into that invoice when it's generated."

#### PRODUCT SUMMARY:

PCLaw® client, matter, billing and accounting software from PCLaw | Time Matters™ helps keep small to midsize firms' matters and finances organized and in control. With practice and financial management tools all built into one program, PCLaw helps track time and expenses, expedite billing, pay vendors, reconcile bank statements, centralize client and matter details and so much more. In addition, PCLaw dashboards give you a quick-scan look at your firm's most essential information on one screen, so you can get on top of your day, your client needs and your finances all over your first cup of coffee. PCLaw also has Batch Email Billing, which allows your firm to get bills out faster so you can speed cash flow too.

**PCLaw**

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