PCLaw®

Law Firm Practice Management Case Study

CHRISTINE RUTHER

"PCLaw® has definitely hit the sweet spot in terms of user-friendliness."

Christine Ruther, C&R Engineering

Like many small-business owners, Christine Ruther has a passion for her life's work.

Her one-person engineering firm works with a wide range of medical-device designers and manufacturers to consult on quality and regulatory affairs and compliance engineering.
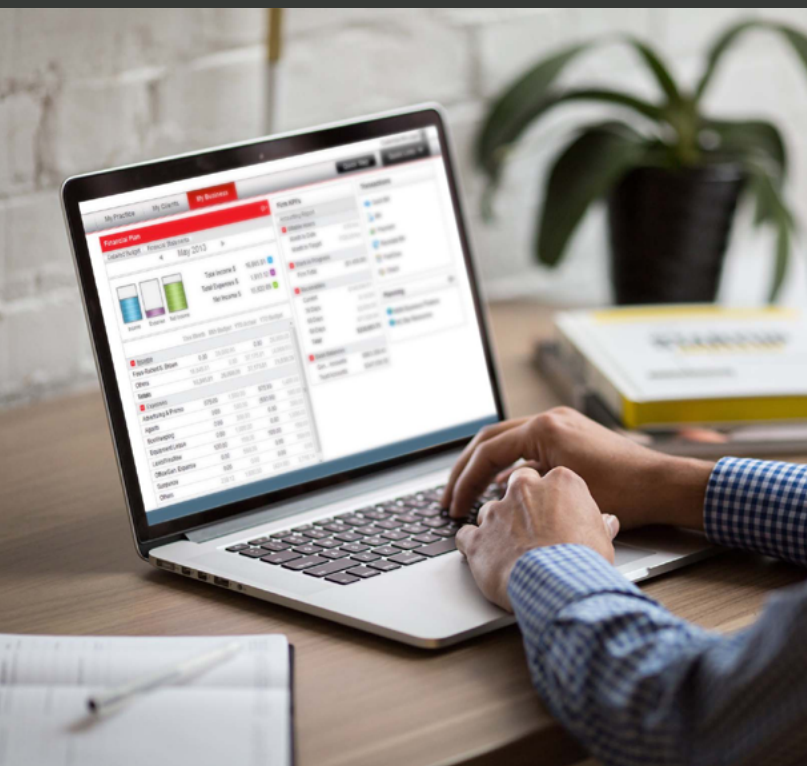
Besides passion for her work, Ms. Ruther also has something else in common with many other small-business owners: She doesn't like spending time on some of the more business-like demands of running a successful business. Like accounting or billing—tasks that have to be dealt with correctly, but which take up time she'd rather spend engineering medical devices.

"At the end of the month, it was taking me pretty much four hours to run billing," she said. "Which is time that I could be doing other things.

"Even if they're not billable hours, I could be taking a long lunch."

As it turned out, Ms. Ruther wasn't the only one who didn't love how she spent her time on the financial side of the business.

"My accountant was basically saying 'you need to have a real accounting program.'"

P|T

As an engineer with a bachelor's degree in physics and a master's in biomedical engineering, it's not as if Ms. Ruther wasn't capable of dealing with her own billing and accounting. The problem was more about the software she found to handle it, which treated the two tasks as entirely different functions.

"My read on it is that it's meant for accountants," she said. "Double-entry is not my idea of a good time.

"As an engineer, I would rather spend time figuring out a spreadsheet and then, as unpretty as it is, work with that."

A fact that didn't sit well with her accountant, who finally told her: "It's not like I'm going to get rid of you because you use spreadsheets, but this is really not terribly professional."

No matter how much she searched and researched, though, Ms. Ruther simply couldn't find a solution that worked for both her and her accountant.

"I had even gone online and looked at different programs and a lot of them did not integrate time-tracking, billing and accounting very gracefully," she said.

Then there were the programs built specifically for engineering firms.

"They really seemed to be designed for firms with engineering and project management, then that data would be ported over to sort of an accounting module. And those weren't really appropriate for me.

"They were very powerful if you had a 20-person engineering firm and you were running 80 projects, but I'm it and I run maybe five projects at a time. I don't need a lot of project management overhead."

"I decided I really needed to look more seriously at something that would make my life easy."

Fortunately, Ms. Ruther's brother-in-law is an attorney, one who had experienced for himself the joy of finding timekeeping, billing and accounting all perfectly integrated in one program.

He recommended the program used by his firm: PCLaw® client, matter, billing and accounting software.

"When I actually was able to get a feel for what PCLaw was and how it worked, I thought, 'Hmm, this looks promising,'" Ms. Ruther said.

"It's incredibly powerful. It's very easy to fix mistakes. And at the end of this past year, after closing year-end and giving a really nice packet of stuff to my accountant, she was thrilled.

"I'm also much better at tracking hours because it is so simple. You just open up PCLaw and click the timer. It's much, much easier.

"I had a friend who talked to me and said 'I don't understand this. The last quarter of the year I was really busy, but my billables were down.'

"I just told her 'You need PCLaw.'"

P|T

"It's a reasonable initial investment and I am just happy as a clam."

Billing is survival in service businesses such as Ms. Ruther's. But like accounting, it's not at the top of her want-to-do list. Not even close.

Since she's converted to PCLaw software for both functions though, she definitely sees the advantage of having timekeeping, billing and accounting in one fully-integrated package.

"It's a much easier process because I just do my pre-billing, then I look through and maybe I realize, 'Oh wait a minute, I forgot to charge them for mileage,'" she said. "So I go back and enter that in and then I do my pre-bill again."

She also appreciates how PCLaw software helps her accommodate the needs of different clients.

"I have retainers on occasion, and I found it to be a very easy process to enter the retainer into the account and bill against that. I set up my invoice and the retainer is noted at the bottom, and any replenishment for the retainer is noted."

Another thing Ms. Ruther likes about billing with PCLaw software is being able to set a particular client's hourly rate, then never worrying about it again.

"I have clients I've worked with for five years and their rates have not increased. And to be able to just select a rate in PCLaw once and have it automatically fill in and not have to keep track of it, that is incredibly powerful," she said.

"You just call them up and they tell you what to do..."

Not being an accountant or bookkeeper herself, Ms. Ruther frequently has questions about the right way to perform particular tasks in PCLaw, or even how to deal with accounting tasks in general.

"Do I call in for support periodically? Oh yes," she said. "They've been very easy, very helpful and it's well worth the annual maintenance plan (AMP) fee just to be able to always have them at my fingertips.

"One of the other things I've been doing periodically is calling in to their Friday one-hour webinars (Feature Fridays) on how to use different parts of PCLaw. And those have been interesting and helpful.

"It's worth taking an hour periodically. It's a nice reminder and I learn a few things I didn't know and I think, 'Oh, that's going to make that easier.'"

P|T

CHRISTINE RUTHER
C&R Engineering

CUSTOMER PROFILE:
Christine Ruther is the owner and president of C&R Engineering in California. She works with medical-device manufacturers and designers on safety-critical areas of compliance and regulatory engineering to ensure they meet the industry's strict quality and regulatory requirements. She brings special expertise to her consulting work as an engineer who has worked in hospitals and as an employee for medical device manufacturers and as former Technical Manager for the Medical Device Testing Group of TUV Product Service (now TUV SUD).

BUSINESS SITUATION:
While the engineering side of Ms. Ruther's one-person consulting firm was very successful, dealing with billing and accounting was causing both her and her accountant stress. The engineering consultant felt that the billing process was taking too much of her time. And her accountant didn't like how Ms. Ruther dealt with everyday accounting using spreadsheets.

SOLUTION:
Ms. Ruther's brother-in-law recommended that she try PCLaw® client, matter, billing and accounting software as the answer to her billing and accounting frustrations. As an attorney, he uses the software in his law firm to reduce the time he spends on the financial side of his business. Once he heard her situation, he realized that having everything fully integrated in one program would make Ms. Ruther's life easier too, while also giving her accountant the materials she needed for month- and year-ends in a more professional, accurate and organized form.

time capture was with PCLaw. When the time was right, Ms. Fanning simply sat the firm's timekeepers in front of a computer screen with the timekeeping function open and showed them what to do. "They picked it up in a minute," she said.

PRODUCT SUMMARY:
PCLaw® client, matter, billing and accounting software from PCLaw | Time Matters™ was created to help keep small to midsize law firms' matters and finances organized and in control. That hasn't kept other types of professional services firms, though, from discovering the ease with which it helps track time and take care of billing and accounting, without having to re-enter numbers at each stage. With practice and financial management tools all built into one program, PCLaw also helps pay vendors, reconcile bank statements, centralize client and matter details and so much more. In addition, PCLaw dashboards give users a quick-scan look at their firm's most essential information on one screen, so busy professionals can get on top of their days, their client needs and their finances at one glance. PCLaw also has Batch Email Billing, which allows firms to get bills out faster so they can speed cash flow too.

PCLaw®

pclawtimematters.com

P|T