

# Time Matters®

## Law Firm Practice Management Case Study

THE COLEMAN LAW FIRM

“Time Matters truly is the lifeblood of our firm”

Attorney Randy Coleman remembers the days before he transformed the way his law firm worked with practice management software, and he has no desire to go back.

Beginning in 2002, Mr. Coleman made the commitment to take his firm paperless—and not just from that point forward, but by creating a complete electronic archive of every bit of data going as far back as 1995.

“It was not difficult going paperless. It was time-consuming. And I had a couple of people who worked full-time for, I don’t know, at least several weeks to get it all done,” Mr. Coleman said.

“We started in 2002 scanning everything, so we literally have every piece of paper that’s gone through the office tied in through Time Matters, going back to about 1995.”

In the end, though, it all became worthwhile, and not just for the sake of improving the firm’s efficiency, but for helping their clients too, not to mention impressing them in a big way.

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“Without exception they are just wowed”

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Making the commitment to archiving every detail of every transaction may have been time-consuming, but considering clients’ reactions when the firm is able to answer questions on the spot about matters as old as twenty years, Mr. Coleman considers it well worth that few weeks’ investment.

“It is really impressive to a client when they call about a document that was completed 10, 15 or 20 years ago, and we can immediately pull it up to review it,” he says.

“We’re able to go straight to the actual documents, what we did and when we did it.”



“We have a whole history of everything we’ve done for clients. And with the timeline, I’m able to pull that up and see where, okay, I met with these folks on this date and we met again on this date and they came in and signed their documents on this date, and this is what happened in-between signed their documents on this date, and this is what happened in-between.”

“So it helps answer a lot of questions very quickly that, absent such a comprehensive system, we wouldn’t be able to pull the answers out anywhere nearly so easily.”

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## “Time Matters help us be a whole lot more efficient”

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Time Matters software plays a big part in helping the Coleman Law Firm improve efficiency from front-office to back-office, including automated timekeeping through Time Entry Advisor, which alerts timekeepers when they fail to record particular tasks.

“I know I use it, along with the top-producing attorney other than me. The main thing we get out of Time Entry Advisor is when we tie the emails in,” he said. “Both of us have a tendency to be heavily engaged in the production and receipt of emails through the day and we don’t record our time while we’re doing it.”

“The Time Entry Advisor that’s part of Time Matters now identifies tasks we haven’t billed yet, so we’re able to go straight to them and get them billed.”

Mr. Coleman also uses the shared calendars in Time Matters to help him remember billable time. “We can each see what everybody else is doing and it has a tendency to help us remember to record our own time.”

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## “I can’t imagine practicing law without Time Matters”

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One of Mr. Coleman’s favorite features is also one of the least known: an add-on module available only to Time Matters users called Billing Matters.

“We have the Billing Matters module, so the billing process is really simple,” he said. “We can run the preliminary bills and make whatever corrections or modifications need to be made before we run the final one. And we can share that information among the lawyers using PDFs instead of having to print out a bunch of paper, which has been a tremendous savings all by itself.”

“Going back to pre-Time Matters days, when we did the preliminary bills, we’d print out 200, 300, 400 pages of paper and we did that sometimes twice a month. And now it’s all within the computer so we don’t have to use up the paper.”

Mr. Coleman also uses the reporting feature in Billing Matters to help him understand the financial workings of his firm, including helping determine his attorneys’ compensation.

“I’m still the only equity lawyer in the firm and the other lawyers’ compensation is based on their collected billings,” he said. “As they record their time and develop their invoices, I can review the files. I can review the billing summaries. I can review their time.”

“Billing Matters has a report that generates their collected billings for whatever period of time I want to ask for. So the reporting feature is, for the last three or four years, hands down the most important thing to me.”

## Client Snapshot

### CUSTOMER PROFILE:

Attorney Randy Coleman owns The Coleman Law Firm in Florida. The firm has offices in Jacksonville, Ponte Vedra Beach and Palm Coast and specializes in probate, estate planning, elder law, guardianship, tax and business matters.

### BUSINESS SITUATION:

Starting in 2002, Mr. Coleman made the commitment to take his firm paperless—and not just from that point forward—but by creating a complete electronic archive of every bit of data going as far back as 1995. He accomplished his goal by having several people work full-time for several weeks scanning paper documents into his practice management program. “We started in 2002 scanning everything, so we literally have every piece of paper that’s gone through the office...going back to about 1995.”

### SOLUTION:

The Coleman Law Firm maintains their electronic archive using Time Matters client, case and document management software. “It is really impressive to a client when they call

about a document that was completed 10, 15 or 20 years ago, and we can immediately pull it up to review it,” Mr. Coleman says. “We’re able to go straight to the actual documents, what we did and when we did it. We have a whole history of everything we’ve done.” In addition, the firm uses a fully-integrated Time Matters add-on module, Billing Matters, for running pre-bills and invoicing clients.

### PRODUCT SUMMARY:

Award-winning Time Matters® case, client, and document management software helps legal offices of all types streamline workflow and improve profitability in the office and on the go. For 25 years, Time Matters has given attorneys and support staff centralized searchable access to everything from documents to docketing information, contacts to calendaring and so much more. Time Matters helps attorneys devote more time to legal work instead of sorting out administrative details.

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