

# SMALL PRACTICE SUPPORT PROGRAMME

## SMALL PRACTICE MONTHLY BULLETIN – JUNE:

### THE BENEFITS OF A CASE MANAGEMENT SYSTEM

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#### BACKGROUND

The Crowe Market Study of Sole Practitioners and Smaller Legal Practices has identified the use of new technologies and software as being crucial to the success of any legal practice. In particular, a case management system can greatly enhance operational efficiency and help counteract the effects of competition from other legal services providers.

This bulletin aims to give you an understanding of the key features and benefits of a case management system, whether you are using it for the first time, or if your practice already has one.

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#### WHAT IS A CASE MANAGEMENT SYSTEM?

A case management system is a piece of computer software that consolidates, organises and stores client and case information in a location that is accessible from your computer or other work device. It then uses that information to help you organise and manage your workload and your clients. For practice owners, case management software has many sophisticated features which will also assist you in understanding and running your practice.

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#### WHAT ARE THE CORE FEATURES OF A CASE MANAGEMENT SYSTEM?

##### File Management

All of your client information (correspondence, emails, pleadings, documents and billing information) can be filed in one place, making it much easier to access whenever you need it.

##### Diary Management

Case management software can be used to plan your diary, alerting you when you need to meet a deadline.

##### Timekeeping and Billing

Using case management software tools, you can track the time spent on individual tasks making billing quicker and

easier. Most systems can also be integrated with accounting software packages, where compatible.

#### Templates

Many case management systems allow you to create and save commonly used documents as templates which can be added to individual files and edited as required.

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#### WHAT ARE THE MAIN BENEFITS OF A CASE MANAGEMENT SYSTEM?

##### Improved organisation and efficiency

Keeping all your client information in the one centralised place makes it much easier to quickly view and instantly retrieve any information you need, whenever and wherever you need it.

##### Enhanced Security

Legal practices keep a substantial amount of confidential client information on file. Case management systems back up information regularly, ensuring against any data loss. Built in checks and traceability can help ensure your practice's compliance with data protection and other regulatory requirements.

##### Greater Collaboration

Most systems allow files to be shared with authorised users within the firm, allowing multiple staff to collaborate and work on a case at the same time, with all information consistently updated to all. Shared access to files helps create a team environment. It also helps establish accountability, allowing you to see who has accessed a file and if or when changes have been made. Some case management systems will also allow you to collaborate with clients, using a secure connection.

This eliminates the security risk of sending sensitive documents by email.

### Greater Client Satisfaction

Using a case management system, staff are able to view client profiles at a glance. The client will feel their history is known. In the event of a question or issue, information can be accessed quickly and efficiently. Case management systems also allow for a client service strategy to be successfully implemented, preventing deadlines or tasks from being neglected and helping you maintain regular communication with your client.

### Better understanding of client base

Practices can use their case management system to give them a better understanding of their client base. This could include gathering information about the client themselves, such as client type, industry/ sector, location, age, family details, hobbies and personal interests. It can also help practices understand the services their clients use most regularly and the types of communications they like to receive.

### Targeted Marketing

Your case management system can support your marketing efforts by generating targeted client lists and allowing you to position your service and tailor messages to those different client lists. This will improve engagement and response from your client base. Your case management system can also integrate marketing tools allowing you to track the response rates to communications sent. This will help you measure the success of your communications plan and support you in your marketing budget planning.

### Improved financial performance understanding and evaluation

Your case management system will allow you to generate sales and revenue reports and dashboards. This will help you identify any trends underlying your financial performance. This deeper understanding will enhance your business forecasting, strategic planning and decision making.

This Bulletin is part of a series of Small Practice Business Bulletins delivered to you by Crowe as a follow on to the recommendations of the Crowe Market Study of Sole Practitioners and Smaller Legal Practices in Ireland. Crowe is a leading business advisory and accountancy firm in Ireland and is part of the Crowe Global network.

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## SUMMARY

The benefits of a case management system are wide and substantial, both for staff within a practice, as well as practice owners. The organisational, operational, marketing, people and financial management benefits that can be gained from a case management system will ultimately reduce costs and drive higher revenues. This will make any practice more competitive and profitable leading to a more sustainable practice in the long term.



### TOP TIPS

- Ensure that your practice is utilising a case management system that is suitable for the size and activities of the practice,
- Ensure your practice is exploiting all the available functionality that could add value to your practices activities,
- Ensure due consideration is given to access permissions and compliance with regulations such as GDPR,
- Ensure client information is gathered consistently across all clients, so the investment in the case management system can be maximised.

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