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TASK MANAGEMENT AND BILLING REMOTELY

Over the past several months we discussed issues that our firm encountered while developing our ability to work remotely. In our last article, we will discuss how to get things done, making sure they got done, and most (importantly) getting paid.

Every lawyer I know is busy. One of the biggest problems most lawyers face is how to stay on top of all the things that we need to accomplish in any given case. We need to be able to identify what tasks need to be done, develop a plan on how to accomplish those tasks and projects, and then make sure that we get those things done.

I would first recommend that you get a copy of “Getting Things Done” by David Allen. You’ve probably heard of it, or might have already read it. If not, this book could very well change your life. It did mine. This book is required reading for every new hire in our firm. The book talks about a methodology for getting things out of your head and into a system that makes sure that you know what you need to accomplish and a way to make sure it gets done. Another benefit of the book is that most of the productivity software out there is based on the same methodology.

We realized that we needed a system to make sure that we were getting everything done to stay on top of the cases we have. While most all practice management software provides task management capability, we wanted something that was a little more developed specifically for task management. This software allows us to create a project file for each client matter. Then we can create all the tasks that must be accomplished in that matter. We can tag each task that is created by different categories that we create, which allows us to group similar tasks.

The first program that I would suggest is Omnifocus. Omnifocus has been around a while and is set up to allow you to put the “Getting Things Done” methodology to work. There is a video tutorial that is available from David Sparks at <https://www.macsparky.com/omnifocus> that will get you up to speed in no time. Omnifocus is probably the easiest program to get started with and for 99% of folks it is all you will ever need. The biggest downside to the program was that it did not let us share projects with other team members. That was a deal breaker for our firm. So, we moved on to Nozbe.

Nozbe is a cloud based subscription software. While I don’t like paying for it year after year, it is really good at what it does. It is also cheap. The biggest advantage to the software is that it allows you to invite other team members to projects so you can share tasks. This capability allows you to assign tasks to other folks and then find out when those tasks have been completed. Nozbe also makes it very easy to set up matter templates.

Using matter templates makes coming up with all the things that need to get done in a particular case almost automatic. Most of our cases are essentially the same seven or eight types of cases that we repeat over and over with different clients and a different set of facts. When you create a client template you are basically just listing all the different tasks you have to complete in that case from beginning to end. When a client comes in with that type of case, the software automatically populates a list of tasks to complete the matter. You can then assign those tasks to different team members and add deadlines for task completions. Nozbe also allows you to attach files to tasks so that forms will automatically be

available for the person assigned to draft that document. All in all, client templates systematize the process of handling cases. They are easy to set up, save you tons of time, and insure that you do not forget something.

Next is billing. You need to be able to bill when you are working remotely. For us the billing solution is found in our practice management software. We use Rocket Matter, but there are many other programs out there. Most programs have very similar billing capabilities.

We like to make sure that we get paid. We send clients bills every single month on the last day of the month. With Rocket Matter, I go through each user’s billing activity to make sure the billing is appropriate and fix any typos. Then I click a button and all the bills are processed. Each client gets an email with their monthly invoice attached that describes all the work we did on their case. Their invoice also tells the client how much money is in their trust account and how much money they owe us that month. Rocket Matter will automatically adjust all of the account ledgers so everything stays up to date. If a client owes us money or needs to replenish their trust account, there is a link in the email they can click to pay their invoices. Once they pay their invoice, their payment is automatically credited to their account and deposited in either the firm’s operating or trust account. We still have to transfer money from the actual bank accounts, but Rocket Matter takes care of the rest.

Transitioning from a paper driven office to a paperless, mobile enabled office might seem overwhelming but you probably have most of the equipment required. Spend some time thinking about your practice. Do you want to spend more time out of the office? Do you want to lower overhead and increase your happiness? Are you willing to take some ribbing about how much you go to Disney World? If so, start considering your options and implement them one at a time until you feel comfortable with each step. Soon, you’ll be drafting briefs on the beach.

