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PRACTICE MANAGEMENT

BUYER'S GUIDE: 2023 EDITION

Drive Efficiencies Through Client Intake and Relationship Management with Lawmatics

> "Lawmatics is a cloud-based Client Relationship Management (CRM) tool used to manage and customize everything from intake to time & billing. The platform was designed to automate repeatable processes, allowing attorneys to spend less time on administrative tasks and more on the practice of law."

Company Name Brand
Lawmatics

Product Name Brand(s)
Lawmatics

Latest Developments and Updates

- Time & billing, and payment plans– collecting payment for consultation fees is made easier with the LMPay Gateway in custom forms and booking forms. Including this advanced field in your consultation forms simplifies appointment scheduling and making consultation payments for your clients.
- You can now use Lawmatics to perform your firm's conflict checks automatically or manually. The system searches against all account data, including fields and notes, and instantly alerts you if it finds a match.
- Improvements for managing tasks, including custom task statuses, sub-tasks, and comment threads on tasks.
- Booking forms updated so a firm can select Zoom as a meeting location and add the link to an event, along with the ability to allow multiple attendees in one event, and book with the earliest available meeting host.
- Increase email deliverability with the option to send emails from your outbox. This allows any emails sent through Lawmatics to appear in the outbox of your regular email client.

Increase Productivity and Results with Automation

Lawmatics is a cloud-based Client Relationship Management (CRM) tool used to manage and customize everything from intake to time & billing. The platform

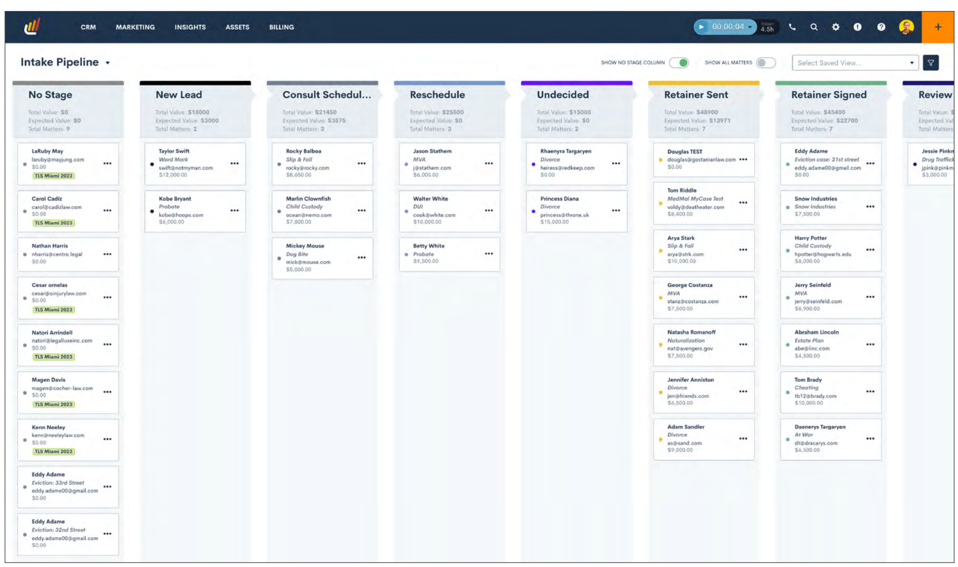

Figure 1: The intake pipeline provides an easy visual showing each pipeline stage with a list of each potential client. Users can get a quick update on matters and their progression through the intake process.

> “Lawmatics has designed a system to automate and manage intake with streamlined communications and easy payment options. Law firms can design phone-based intake forms to meet their needs.”

was designed to automate repeatable processes, allowing attorneys to spend less time on administrative tasks and more on the practice of law. Custom automation plays a key role in Lawmatics, incorporating triggers and taking users to the next step. A firm can quickly and easily build forms using conditional logic and set multiple conditions with “and/or” relationships.

From Intake to Client

Clients are the bedrock of every firm. It is essential to cast a positive impression of a firm in the initial intake process. Lawmatics has designed a system to automate and manage intake with streamlined communications and easy payment options. Law firms can design phone-based intake forms to meet their needs. The platform is customizable to help facilitate the easy collection of necessary information. Based on data entered in a form, additional fields can become available to enter other facts.

Once the type of consultation is selected, a user is automatically taken to the scheduling section of a form. In addition to standard scheduling options, like date and time, there are new features implemented, including the ability to add additional attendees (other than the initial contact) as well as selecting a Zoom meeting as the location, which includes a meeting link in the invite. The ability to schedule free consultations is an existing feature; however, it has been upgraded to allow for paid consultations with the addition of LMPay. A user is taken to a payment form after picking a date and time for their consultation to capture payment information. Payments can be made by credit card or bank account, providing significant time savings by including billing as part of the automation process.

After a phone intake form is submitted, a user can find the case on the matter page, which lists all matters and can be sorted by stage, practice area, or status. Matters can also be found on the pipeline page, which provides a Kanban view of all your matters by their current stage, and you can drag/drop matters from one stage to another. This view provides a visual representation of the overall status of matters going through different pipeline stages. The customizable stages are color-coded and typically include intake milestones such as new leads, consult scheduled, reschedule, undecided, retainer sent, and retainer signed. Select a matter from the matter or pipeline page, and you will be taken to that matter’s activity timeline. *See Figure 1 on the previous page*.

The activity timeline shows all activities that have occurred in a matter. It provides action buttons for users to take action

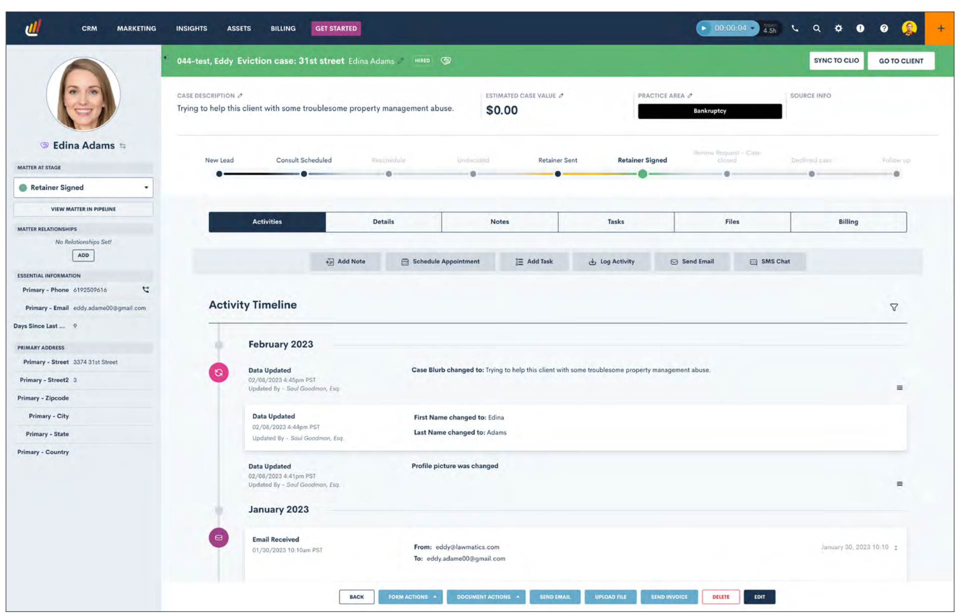

Figure 2: The activity timeline shows contact information along the left panel with the timeline to the right. Users can access details, notes, tasks, files, and billing information. Additionally, users can add notes, schedule appointments, add tasks, log activities, send an email, or send an SMS message. The matter phase is indicated at the top of the page.

> **“Task-related communication improvements include the ability to add comments to a task, allowing users to ask a question or request more information, and using @mentions in task comments to ensure a team member doesn’t miss a question or directive.”**

easily, such as adding notes, scheduling appointments, adding tasks, logging activity, and sending emails or SMS text messages. Users can also see details related to a matter, billing information, notes, existing tasks, or files. Billing Information is presented initially on an overview, showing time, invoicing, and trust account summary. With a mouse click, a user can see more detailed information on time entries, expenses, invoices, payment activities, and trust accounts. Files are also available from the timeline. Having all documents for the intake and billing processes in one place is extremely helpful, and users can create folders to assist with organization. *See Figure 2 on the previous page*.

Task Management

The automation capabilities in Lawmatics continue evolving, becoming increasingly valuable to users. Enhancements to tasks enable a firm to customize its status in a way that makes sense for the practice. You can add sub-tasks to build workflows that ensure each task is done correctly, and no steps are skipped. *See Figure 3*.

Task-related communication improvements include the ability to add comments to a task, allowing users to ask a question or request more information, and using @mentions in task comments to ensure a team member doesn’t miss a question or directive.

Client Portal

Lawmatics provides a user-friendly client portal that helps eliminate the game of tag via email and phone. Clients can collaborate with their legal team, sharing files and calendars. Send documents securely from Lawmatics for client signatures and incorporate deadlines to provide more control over agreements. This streamlined communication reduces waiting time for both clients and the law firm.

Security and Integration Friendly

Lawmatics is hosted on Amazon Web Services (AWS) with state-of-the-art security and privacy features built into the platform by default; 256-bit AES encryption of stored data; data sent and received using 128-bit SSL encryption; two-factor authentication (2FA); nightly backups to redundant Amazon S3 servers; military-grade physical protection with 24-hour security escorts; and all staff are trained and updated on the latest technology security protocols.

Lawmatics has an open API developer platform and existing integrations with several applications. Existing integrations include Clio, MyCase, Zapier, Rocket Matter, Practice Panther, and LawPay.

Pricing

Lawmatics offers simple and transparent pricing in three product bundles: Lite, Pro, and Enterprise. The products include various features of client intake, CRM, marketing automation, customer reports,

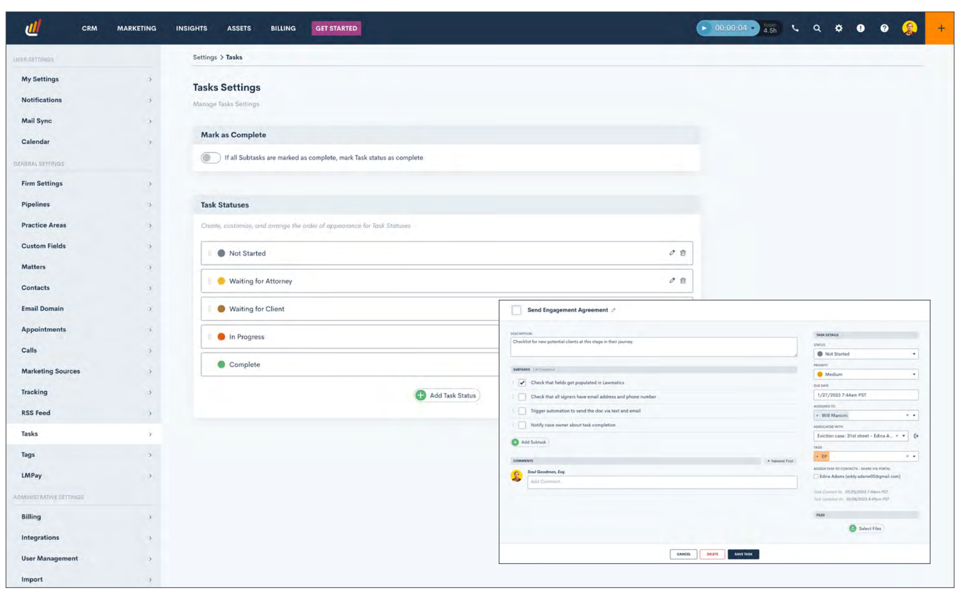

Figure 3: Task improvements include customizable statuses that closely correlate to firm processes. Sub-tasks are also available, ensuring no steps are overlooked.

and insights. All products come with CRM features, one-way SMS/text messaging, e-signatures, custom reporting, API access, and more. The Pro and Enterprise products support client portals.

The Pro version is the most common plan, and its $249/month base price includes:
- 3 Users, $59/mo/user additional
- 15,000 Contacts, $25 per additional 5,000
- Custom Forms
- Appointment Scheduling
- 100 Emails/Automations
- Document Automation
- 400 eSignatures/month, 10¢ additional
- File Requests
- 15,000 Contacts, +5,000 $25/mo.
- CRM
- Conflicts Checking
- SMS/Text Messaging
- HTML & Plain-Text Email Builder
- Email Marketing Campaigns
- Custom Email Domain
- Full Analytics & Dashboard
- Custom Reporting

The Lite version is $199/month and includes three users. Pricing for the Enterprise version is available upon request. There is a $399 one-time setup charge and a 12-month minimum agreement. The time and billing module is an additional $29/month/user, and a user must have a Lawmatics user account. Reach out to Lawmatics to get custom pricing for your firm.

Who is Lawmatics?
Based in La Jolla, California, Lawmatics was founded by Matt Spiegel and Roey Chasman. Lawmatics offers an end-to-end legal CRM solution that provides law firms with comprehensive solutions for client intake, marketing automation, and time & billing.

Why Buy Lawmatics?
- Lawmatics allows firms to build their own processes with easy-to-use automation.
- Create customizable forms to collect important information specific to your firm.
- Lawmatics provides a data-driven and highly customizable platform.

Try Lawmatics Today!
Learn about additional features on the Lawmatics website or **schedule a demo** to see it yourself. Follow Lawmatics on LinkedIn, Twitter, and Instagram to keep up on changes and improvements to the platform.

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