

## Case Study— Practice Management

Firm triples in size with systematic approach to practice management and by selecting the right software solutions.

### Hughes & Scalise, PC

#### Overview

**Location:** Birmingham, AL

**Industry:** Legal representation related to business succession planning, charitable planning, estate and trust planning, general corporate law, probate law and taxation.

**Customer Profile:** Founded in 2004, Hughes & Scalise, PC, is a six-attorney firm characterized by deep professional expertise and experience, along with efficient systems and a strong client focus.

**Business Situation:** After working together in a regional firm with 300 lawyers, two experienced estate planning attorneys decided to open their own small firm. They needed practice management software that would meet the needs of a transactional practice with a high volume of documents.

**Solution:** Working with Certified Independent Consultant Pat Cunningham, Hughes & Scalise chose LexisNexis® Time Matters® practice management software combined with LexisNexis® PCLaw® billing and accounting software.

#### Benefits:

- Business success enabled the firm to grow from 4 to 12 professionals in 7 years.
- Firm leaders have the tools to keep a close eye on financials and productivity.
- The firm can effectively track referrals and target marketing, as well as quickly share vital updates to the law with clients.
- With improved productivity, professionals in the firm save time for other client work.

#### Product Summary:

LexisNexis® Practice Management Solutions

**Time Matters software** helps law firms improve efficiency by centralizing case and matter information, integrating seamlessly with a wide variety of applications—including PCLaw—and providing 24/7 remote and mobile connectivity.

**PCLaw software** provides billing, accounting and financial tools specifically for law firms. You can use PCLaw to track time and expenses, expedite billing, perform trust accounting, generate financial statements and more. PCLaw also provides 24/7 remote and mobile connectivity.

When Nancy C. Hughes and Leah F. Scalise chose to leave a large regional firm to open a small estate planning practice, the pressure was on.

Each attorney had deep legal experience, but neither had run a small firm. As they worked on a strategic plan, they carefully selected tools to manage their practice, including software for time tracking, financial management, document management and calendars.

At the same time, Hughes and Scalise noticed that many firms were moving toward a paperless environment. The potential advantages were appealing.

### The Solution

Some attorneys open a small practice and then determine what kind of software they need. In contrast, Hughes and Scalise wanted to take a strategic business approach. They drew on a variety of resources—some of them close to home.

Hughes was inspired by the entrepreneurial spirit of her father, a successful businessman. Scalise's father, who had been a military logistician, drew a diagram outlining the firm's business plan. A key step on the diagram was acquiring practice management software.

By then Hughes and Scalise were already in touch with Pat Cunningham, a Certified Independent Consultant and owner of C&S LegalTech. Cunningham and her team support firms nationally and specialize in Time Matters® and PCLaw® software from LexisNexis®. Pat presented a variety of software options and offered her expertise as to what would best meet the new firm's needs.

At decision time, Hughes and Scalise opted to gain more perspective with a change of scenery. "We received Pat's presentation materials and actually went to the beach to do the final planning," says Hughes. As they took in the rhythm of the tides, they made some careful choices, including Time Matters practice management software, PCLaw billing and accounting software and HotDocs® document automation software, which integrates with Time Matters. "We came back to the city and didn't miss a beat," says Hughes. We were up and running within a week."

Hughes adds, "It was a seamless transition even though we were a start-up business."

*“PCLaw is really helpful in a small shop—very user-friendly. As a management tool, PCLaw is great. As a timekeeping tool it’s one of the best.”*

—Nancy C. Hughes, President  
Hughes & Scalise, PC

*“With PCLaw we have peace of mind. We know we can trust what we are looking at, and we have quick access to our financial information.”*

—Leah F. Scalise, Estate Planning Attorney  
Hughes & Scalise, PC

## Benefits

### PCLaw software

Hughes & Scalise use PCLaw for timekeeping, as well as billing and accounting. The firm manages its general ledger as well as income statements, balance sheets and client referral reports using PCLaw.

“With PCLaw we have peace of mind,” says Scalise. “We know we can trust what we are looking at, and we have quick access to our financial information.”

In some firms lawyers dictate their time and have a secretary type it in because their timekeeping software can be daunting,” Scalise adds.

“But PCLaw is very easy to use.”

Says Hughes, “PCLaw is really helpful in a small shop—very user-friendly. As a management tool, PCLaw is great. As a timekeeping tool it’s one of the best. It enables us to keep our time without a whole lot of effort.”

### Time Matters software

Says Hughes, “Time Matters is sort of the brain of our firm. I can’t imagine operating without it. You have quick access to anything. You can easily search and find any information you want.”

Time Matters helps the firm share information, save money, save time and communicate effectively with groups of clients.

### Sharing information

The professionals at Hughes & Scalise use Time Matters to manage client data, documents, calendars and contacts. By requiring everyone on staff to save information in Time Matters, the firm benefits from a centralized resource that everyone can easily search.

Says Scalise, “It’s very convenient when you get a call from a client with a question and you can pull up a document that they actually signed, read it within seconds and answer their question.”

She adds, “It’s nice to get an answer and be able to get something done without having to put it on a to-do list. It helps us be much more efficient. That’s really critical when you’re small and you have a lot going on.”

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Hughes & Scalise, PC

### **Containing costs in a paperless environment**

Entering all relevant client and matter information into Time Matters is helping the firm move toward a paperless environment. Staff members scan all executed documents and save them in Time Matters to provide quick electronic access.

Says Scalise, “The fact that we are scanning our documents and moving to less paper will save us money because we don’t have to store files in a warehouse.”

### **Saving time**

In addition, by creating about 200 documents per week using HotDocs templates rather than drafting them from scratch—and then saving the documents in Time Matters software, the firm is improving productivity and saving about 100 hours every week that can be used for other client work.

### **Promptly communicating with groups of clients**

When a change in Alabama tax law was announced last December, the firm was able to easily identify impacted clients and send two customized mailings—one broad and one targeted—in early January, thanks to the data and communication tools in Time Matters.

### **The value of working with a consultant**

Hughes & Scalise have worked effectively with Time Matters and PCLaw software from the start. Part of that success stemmed from the firm’s relationship with Cunningham. Says Scalise, “We liked the products and trusted Pat’s judgment ... and we continue to trust her judgment.”

Scalise notes, “Pat has intricate knowledge of how to manage a law firm. She’s an IT person too and does lots of problem solving for us.”

In setting software up for the firm, Cunningham made sure the products were linked to eliminate the need for duplicate data entry. This saves staff members time and reduces the risk of errors and inconsistencies.

From PCLaw or Time Matters, staff members can pull up a variety of information originally saved in the other application. Because information entered in either software application is automatically updated and available in the other, the result is a seamless experience and integrated reporting.

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*“Referral reports help us know where to focus our marketing dollars.”*

—Leah F. Scalise, Estate Planning Attorney  
Hughes & Scalise, PC

### Continuing to grow the business

At an annual planning retreat, members of the firm rely on a variety of reports generated by PCLaw and Time Matters software, including analysis of the top 100 clients by type and a report of client referrals, mainly involving bankers and brokers. Notes Scalise, “Referral reports help us know where to focus our marketing dollars.”

Hughes and Scalise recognize the contributions that Time Matters and PCLaw are making to their firm’s success. “When you start a business, there’s a little bit of risk,” says Scalise. “When you get a little distance after a few years and see that it went well, you have to look back on what made that happen. And the practice management software running the office was critical.”

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## About LexisNexis

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