



Online Live Stream

Strategies to Scale Your Firm with Automation

Speakers



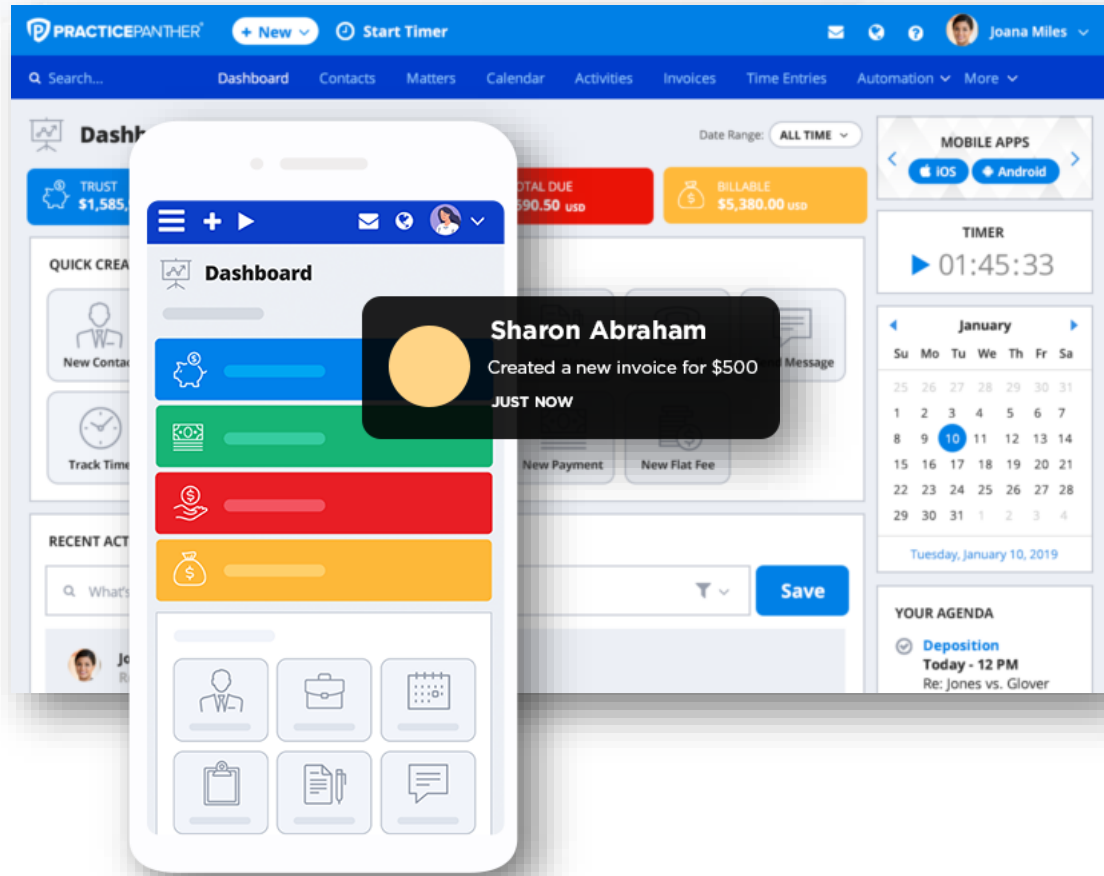
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PracticePanther

All-in-one legal practice management software



Automate workflows

Set conditional tasks, reminders, and custom tags.

Seamless case management

Link your contacts, matters, and invoices.

Built-in compliant payments

100% compliant with IOLTA, ABA, and all 50 state bar guidelines.

Secure, built-in eSignature

Easily send multiple documents for signing at a time. Send and view signed copies of documents from PracticePanther.

Today's discussion

- Importance of clean intake
- Using templates to speed internal processes
- The power of automated workflows
- Scaling through batch operations
- Tips to stay organized

Streamline intake process for clarity

Fast & seamless intake process

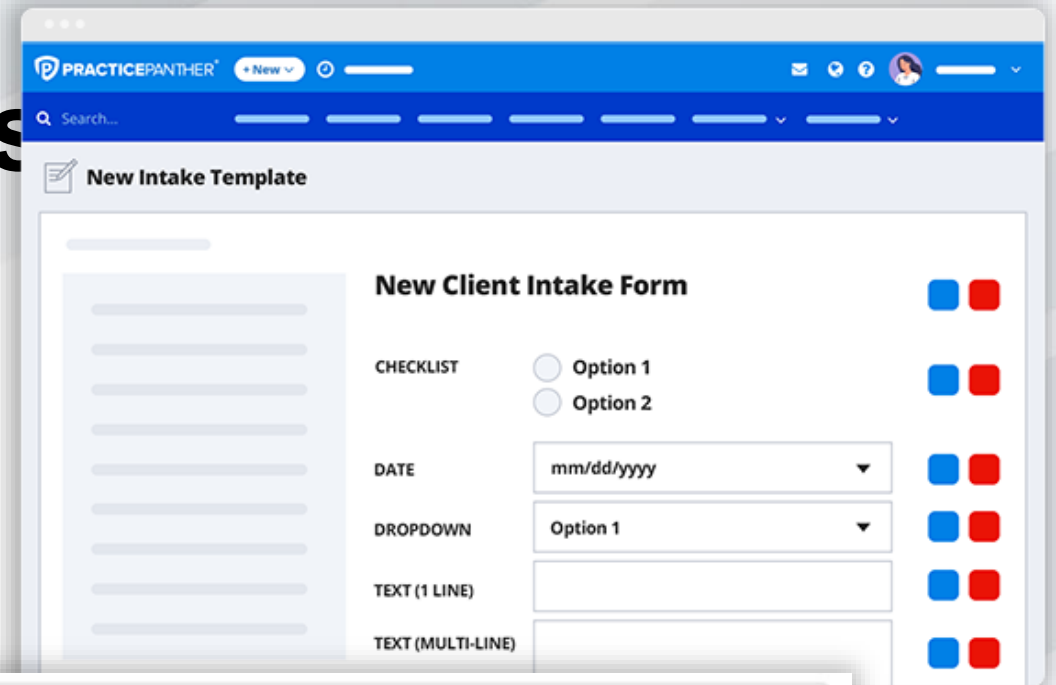
Go paperless and invite clients to fill out intake forms on your website or via an iPad in the office. No more shuffling paperwork.

Customize the look & feel

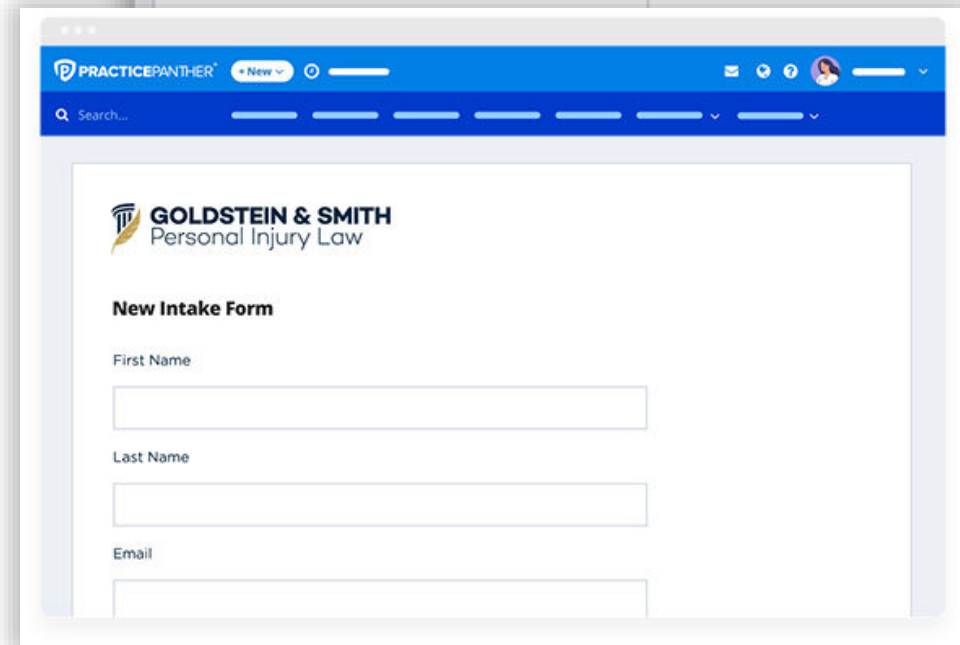
Build unlimited intake forms that reflect your firm.

From Lead to Referral

Intake forms can be multi-functional for different stages in a case.



The screenshot shows the 'New Intake Template' interface in the PracticePanther software. The top navigation bar is blue with the PracticePanther logo, a '+New' button, and a search bar. Below the navigation bar, the title 'New Intake Template' is displayed. The main content area is titled 'New Client Intake Form' and features a list of form fields on the left and a configuration panel on the right. The configuration panel includes a 'CHECKLIST' section with radio buttons for 'Option 1' and 'Option 2', a 'DATE' field with a dropdown menu showing 'mm/dd/yyyy', a 'DROPDOWN' field with a dropdown menu showing 'Option 1', and two 'TEXT' fields: 'TEXT (1 LINE)' and 'TEXT (MULTI-LINE)'. Each field in the configuration panel has a blue and red color selection icon to its right.



The screenshot shows a completed 'New Intake Form' for Goldstein & Smith Personal Injury Law. The top navigation bar is blue with the PracticePanther logo, a '+New' button, and a search bar. Below the navigation bar, the title 'New Intake Form' is displayed. The main content area features the Goldstein & Smith Personal Injury Law logo and the text 'New Intake Form'. Below the logo, there are three text input fields labeled 'First Name', 'Last Name', and 'Email'. The 'First Name' field is empty, the 'Last Name' field is empty, and the 'Email' field is empty.

Utilize custom document templates

The screenshot shows the PracticePanther interface. At the top, there's a blue header with the PracticePanther logo, a '+ New' button, and user profile information. Below the header is a search bar and a 'Files' section. The main content area shows a document titled 'GENERAL-AGREEMENT.PDF' with a 'Reload' button and an 'Open in Box' button. The document content includes the logo for 'GOLDSTEIN & SMITH Personal Injury Law' and the title 'GENERAL AGREEMENT'. A 'Document Templates' modal is open, showing a search bar, a table of templates, and a list of template fields.

NAME	SHARING	CREATED BY
Divorce Pleading	Public	Stanley Panther

50 ITEMS PER PAGE 1 - 1 OF 1 ITEMS

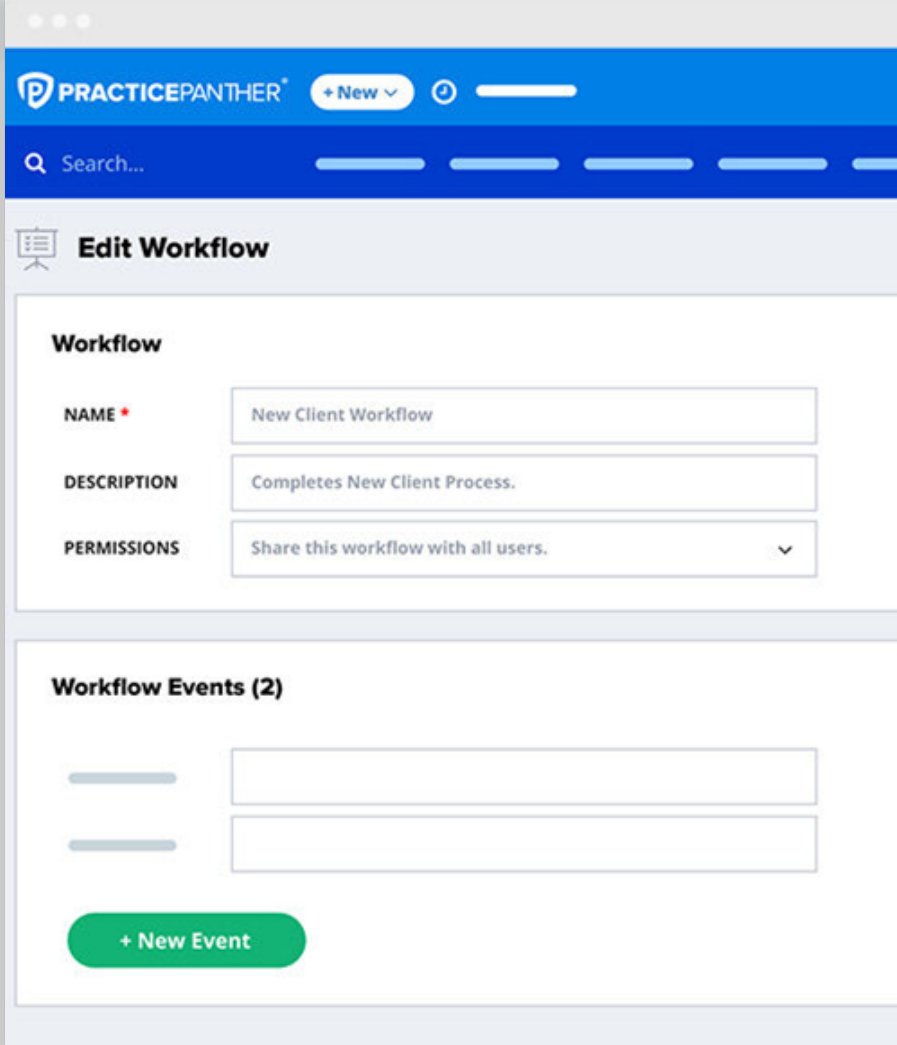
TEMPLATE FIELDS
Use these fields in your template, we will automatically replace them with contact, matter and user information when you apply the template.

CONTACT -	
NUMBER	#Contact.Number#
COMPANY NAME	#Contact.CompanyName#
COMPANY NOTES	#Contact.CompanyNotes#
WEBSITE	#Contact.Website#
ASSIGNED TO	#Contact.AssignedTo#
CONTACT TAGS	#Contact.Tags#
CONTACT OPERATING BALANCE	#Contact.OperatingBalance#
CONTACT TRUST BALANCE	#Contact.TrustBalance#
CONTACT PAID	#Contact.Paid#
CONTACT BILLABLE	#Contact.Billable#

- Create and customize templates for demand letters, wills, fee agreements, and any type of document you need to generate repeatedly — then use it again and again.
- Our white-label templates let you send professional documents with your logo, not ours.

Set tasks on autopilot with custom workflows

- Automate repeat steps and create a flow of tasks that need to happen each time.
- Reduce errors, align with colleagues, and always be a step ahead with our customizable workflows.



The screenshot shows the 'Edit Workflow' interface in the PracticePanther application. The top navigation bar includes the PracticePanther logo, a '+New' button, and a search bar. The main content area is titled 'Edit Workflow' and contains a form with the following fields:

- Workflow**
 - NAME ***: New Client Workflow
 - DESCRIPTION**: Completes New Client Process.
 - PERMISSIONS**: Share this workflow with all users. (dropdown arrow)
- Workflow Events (2)**
 - Two empty input fields for adding events.
 - A green '+ New Event' button at the bottom.

How to track time to save you time

- Studies show lawyers that enter time monthly lose 55%-70% of their time*
- Ditch the sticky notes- track time *as it happens* with built-in timers
- Review your account on Friday's and you can find 1-2 hours a week on average that would've fallen through.
- Utilizing batch time entry means approving 10 timesheets in the time it would take to input one.

The screenshot displays the PracticePanther software interface for a matter named "John Doe | Test Matter". The top navigation bar includes options like "New", "Start Timer", and various menu items such as "Dashboard", "Contacts", "Matters", "Calendar", "Activities", "Invoices", "Time Entries", "Automation", and "More". Below the navigation bar, there are four financial summary cards: "TRUST \$0.00 USD", "PAID \$0.00 USD", "DUE \$0.00 USD", and "BILLABLE \$650.00 USD". The main content area shows a list of activities with columns for "ACTIVITY", "STATUS", "DATE", "DESCRIPTION", "TIME LOGGED", and "ASSIGNED TO". Two activities are visible: "Call John and give an update" (COMPLETED) and "Meeting" (NOT COMPLETED). The "Meeting" activity has a time range from 10:00 AM to 11:00 AM on 6/23/2021. The interface also includes a search bar, filters, and a pagination control at the bottom.

Expenses made easy

- Stay on top of expenses daily
- Record hard and soft costs
- Pay out expenses from Trust accounts
- All transactions show up on invoices which can be generated with one click
- Run reports on expenses by category or matter

The screenshot displays the PracticePanther software interface. At the top, the 'EXPENSE' form is visible with the following fields: TYPE (Soft Cost), DATE (9/20/2017), AMOUNT (USD) (20.00), and DESCRIPTION (Court Parking). Below the form are three status buttons: PAID (\$-200.00 USD), DUE (\$0.00 USD), and BILLABLE (\$220.00 USD). A navigation bar includes categories like Notes, Messages, Invoices, Payments (1), Time Entries, Expenses (2), Relationships, and Intakes. A table below shows a list of expenses with columns for STATUS, DATE, AMOUNT, and BILLED BY. A row is highlighted with a 'BILLABLE' status, date '9/20/2017', amount '\$20.00', and billed by 'DS'. A blue arrow points from the amount field in the table to the 'Generate Invoice' button in the bottom right. The 'Generate Invoice' button is highlighted with a green box, and a 'Cancel' button is next to it. The interface also shows a sidebar with a list of contacts and matters, including 'Streisand, Barbara' and 'Barbara Streisand -'.

What about flat fees?

- Flat fee billing is vital to many law firms
- Just as simple as logging expenses
- Enter single or multiple flat fees at once
- Generate flat fee reports by contact, matter, user, status, or even flat fees over time

The image displays two overlapping screenshots of the PracticePanther software interface. The top screenshot shows a detailed view of a 'FLAT FEES' entry form with the following fields:

Field	Value
ITEM *	Draft/revise A103
DATE	8/23/2018
QTY	1.00
AMOUNT (USD)	200.00
TOTAL (USD)	200.00
DESCRIPTION	Drafted Motion.

The bottom screenshot shows the 'Multiple Flat Fees' entry form with the following fields:

CONTACT*	MATTER *	DATE*	BILLABLE?	BILLED BY	QTY	AMOUNT	DESCRIPTION
test	test matter	...	Yes	ian oliver	1	0...	Select Item...

Below the form, there are buttons for '+ New Flat Fee' and 'Set Defaults'. At the bottom, there are 'Save' and 'Cancel' buttons. A message below the matter field states: 'This matter is set to item rate. Please select an item.'

Create batch Invoices to save time

- **Save hours** monthly by batch invoicing (Recommended)
 - Avoid having to create each invoice separately
- New Invoice → Multiple Invoices
- Select all matters or hand pick specific matters by case type using the “Tags” filter
- Can even add interest or invoice non-billable matters
- Simplify client payment by grouping multiple matters into one invoice per client
 - Client pays once instead of once per matter!

The screenshot displays the Practice Panther software interface. At the top, a navigation bar includes 'Matters', 'Calendar', 'Activities', 'Invoices', 'Time Entries', and 'Automation'. A blue arrow points from the 'Invoices' tab to a 'Multiple Invoices' button, which is highlighted with a blue arrow. Below this, a modal window titled 'TO INVOICE MORE THAN ONE MATTER, CHECK THE BOXES ON THE LEFT.' is shown. It features a search bar, filters for 'Assigned To', 'Originated By', 'Status', 'Tags', 'Created...', and 'All Time'. A list of matters is displayed, with checkboxes next to each item: 'MATTER', '103 - David's Divorce', '106 - Test Matter', and '1232 - salim2 7/21 matter'. A blue arrow points to the '103 - David's Divorce' item. To the right, a settings panel is visible, containing fields for 'INTEREST TYPE' (Simple), 'ANNUAL PERCENTAGE RATE (%)' (10.00), and 'HOW OFTEN INTEREST SHOULD BE ADDED (IN DAYS)' (30). Below these are two toggle switches: 'INCLUDE NON-BILLABLE MATTERS?' (set to 'No') and 'CREATE ONE INVOICE FOR CLIENTS WITH MULTIPLE MATTERS?' (set to 'Yes'). Blue arrows point to the 'No' and 'Yes' buttons of these toggles.

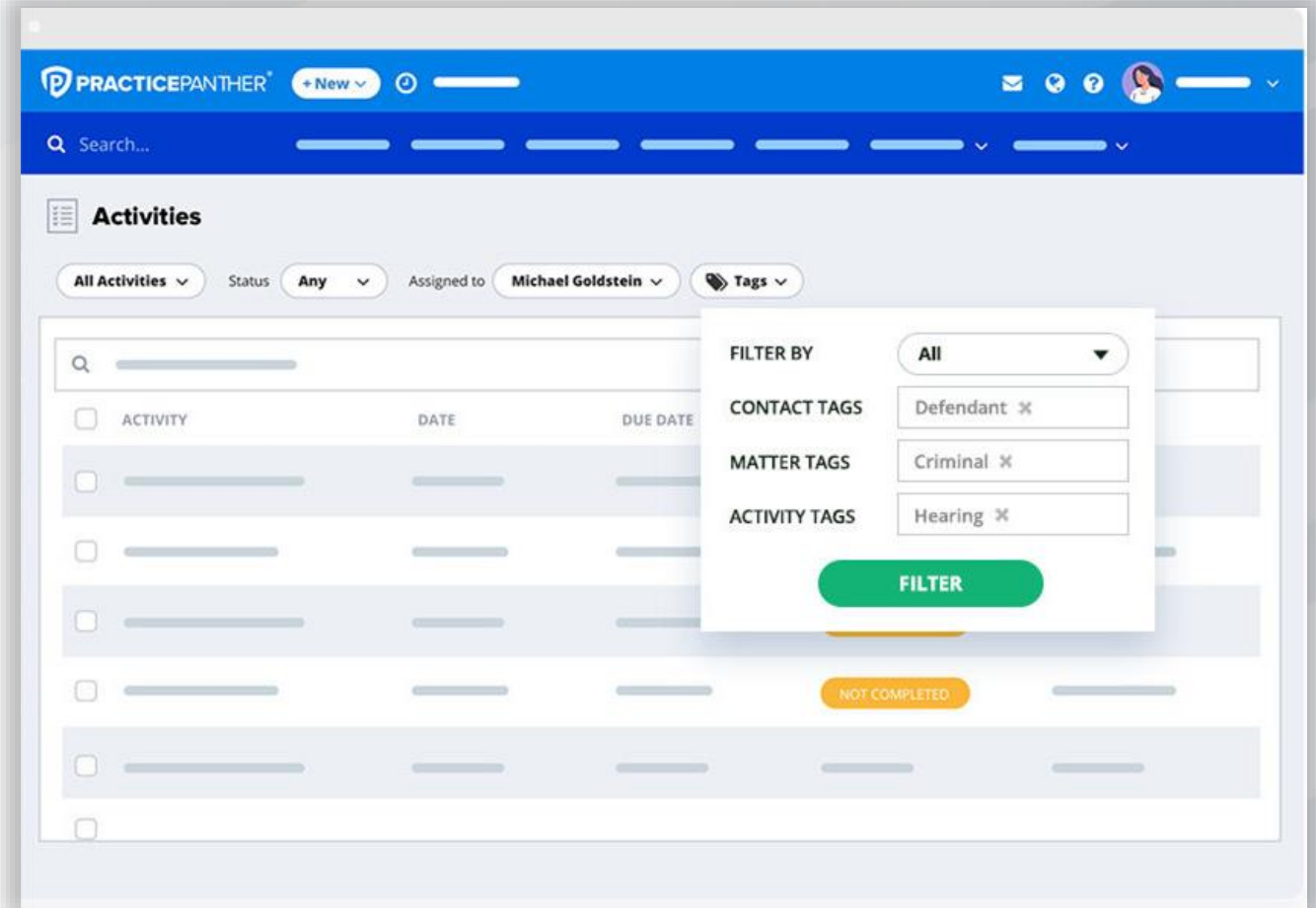
Batch email your invoices quickly

- **Hours** can be saved batch sending invoices (Recommended)
- Once the bills are generated, it's time to finalize and send!
- If your firm utilizes the invoice approval process, simply filter to status "Approved" when it comes time to send
- Select all invoices using the header check-box
- Click "Send"
 - All invoices are sent to primary contact within company contacts

The screenshot displays the 'Invoices' management interface. At the top, there are filters for 'All Invoices', 'Assigned To', 'Contact', 'Any User', 'Tags', 'Bill Date', 'All Time', and 'Status' (set to 'Approved'). A blue arrow points to the 'Status' dropdown. Below the filters, a summary bar shows 'ALL' invoices with a total of '\$3.11 USD' and a 'DUE' date. A search bar is present above the invoice list. The list includes columns for NUMBER, DATE, STATUS, REF. NUM..., APPR... DATE, APPR... BY, TAX, TOTAL, and AMOUNT PAID. One invoice is visible: 'Invoice I-6' dated 7/1/2020, status 'SAVED', due 3/29/2021, by 'David Silberberg', with a total of \$1.00 USD and amount paid of \$0.00 USD. A second screenshot shows a context menu open over the list with '25 items selected'. The menu options are: Mark as Sent, Mark as Not Sent, Pay invoices, Change Template, Submit for Approval, Approve, Send (highlighted with a blue arrow), Print, Download LEDES, Download, and Delete. The background list shows invoices with statuses like 'VIEWED' and 'PAID'.

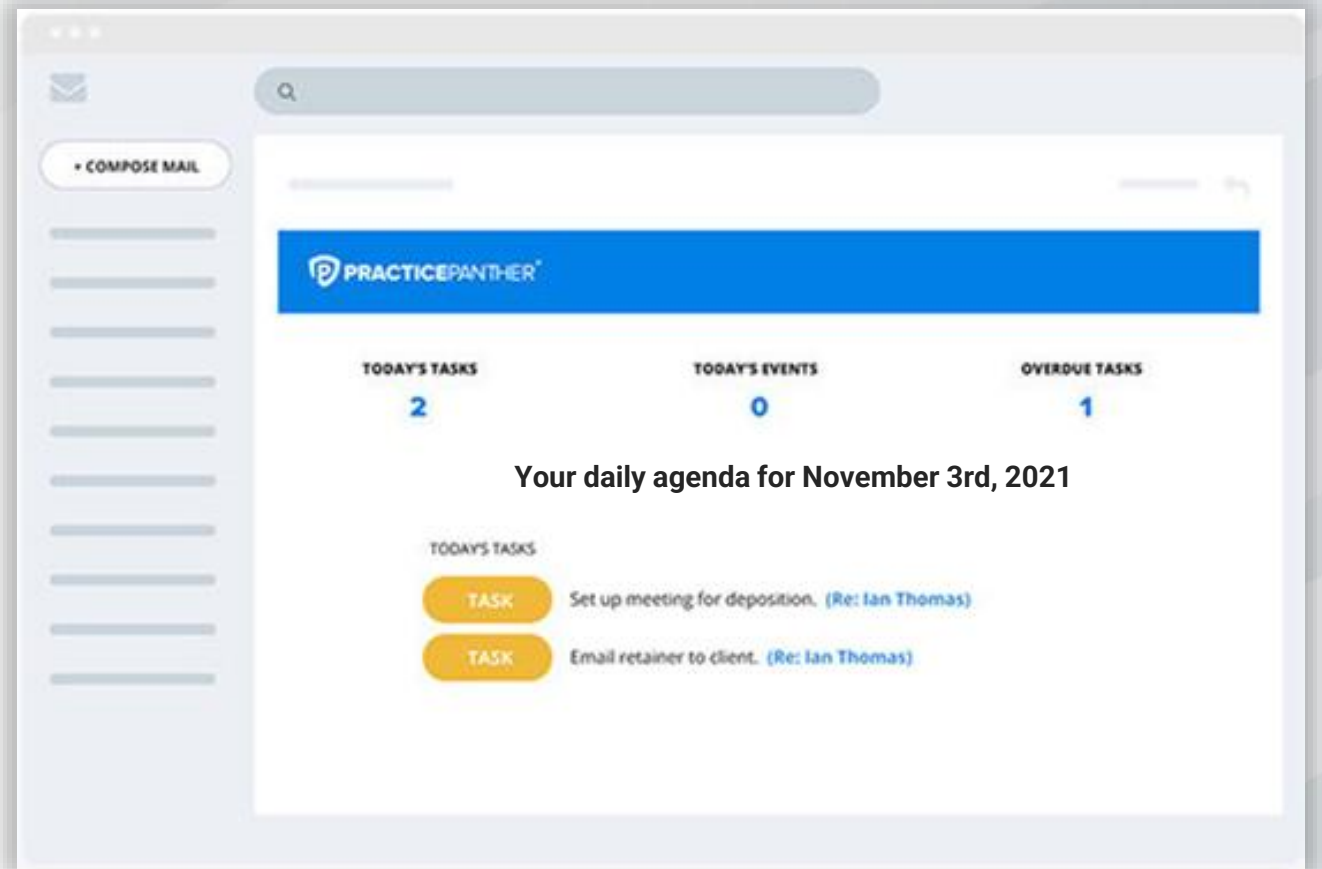
Organize with Reports & Tags

- Set tags on Contacts, Matters, or Activities to explore which practice areas are the busiest.
- Ability to answer questions on the fly.
- Establish tags for different locations, courthouses, or jurisdictions for custom insight.



Stay on top of everything

- Receive daily agenda emails in the morning and get notifications for different tasks & events related to the case.
- Keep a pulse on what's been completed and what hasn't so you never drop the ball with your task dashboard.



Set reminders to stay on task

- Set reminders where it makes most sense for you and stay in sync with your team.
- Automate your workflows and set timed rules for your tasks.

REMINDERS

Popup	2	Hour(s)	
Email	1	Hour(s)	
Text Message	20	Minute(s)	

+Add a reminder

SAVE REMINDERS

PRIVATE

PRIORITY Medium

REPEAT Never

ASSIGNED TO **Users** *

Sammy Alkoubey

Contacts

Select Contacts...

No file chosen

TAGS

ATTACHMENTS

Q&A



PracticePanther.com/demo

ALA member exclusive:

Receive 10% off your first year
on our annual Business Plan