How PracticeMaster is Different from Outlook

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The best way to think about the difference between Outlook and practice management software is the old expression, "Jack of all trades, and master of none." Microsoft created Outlook to be general enough that anyone can use it. Most likely your doctor, accountant, and the owner of your favorite restaurant all use Outlook. It is the jack of all trades. Conversely, legal practice management software like PracticeMaster focuses on one type of user: attorneys. Every feature in PracticeMaster has been designed for use in law firms. The difference can save you time, make it easier to organize your practice, and help you capture more of your billable time. Here are some key differences:

Unlike Outlook, which is designed for any business to use, all features in PracticeMaster are specialized for law firms.

Business Card vs. Client File

Contacts in Outlook are designed to keep track of basic personal information, like the information on a business card. In contrast, PracticeMaster is designed to track entire client files, including contact information. What does that mean? Out of the box, Outlook is ready to track information like "Nicknames," "Birthdays," and "Spouses," while PracticeMaster has matter and client files that are ready to organize information like jurisdiction, area of practice, documents related to a matter, meeting notes, research, and email (see the chart at the end for other examples).

Conflict of Interest Search

Outlook can search your computer for emails, appointments, and contact information for signs of a conflict. PracticeMaster can search the records of everyone in your firm for emails, appointments, contacts, meeting notes, details in fee and cost entries, research, and other client file information. Your conflict search can include the entire office, no matter who is out of the office that day, and the search only takes a few seconds.

Tracking Time

Besides being designed for law firms, PracticeMaster was also designed to work seamlessly with time and billing software such as Tabs3. That means you can easily turn your appointments, emails, research, and time spent writing documents into billing entries. Tracking your time is much more efficient when you can turn any appointment on your calendar into billable time.

Document Assembly

Outlook and Word integrate through "mail merge" functionality. This lets you insert fields from a contact into a standard letter, but your options are limited to the standard fields tracked in Outlook (e.g., name, address, etc.). In PracticeMaster, you can do the same thing and much more with document assembly functionality. You can insert any information into a document from a matter file (e.g., insurance carrier, opposing counsel, etc.). The document assembly process can also automatically create a billing entry for the time you spend on a document. It can automatically schedule a follow-up task for X number of days after you create the document, for example, to follow up with opposing counsel regarding the letter you are sending them. You can even have the document assembly process prompt you to fill in a few blanks for information that you may not have in the PracticeMaster matter file, such as the date a document was signed.

Sharing Information

PracticeMaster makes it easier to work with a team of people in your law firm. You can view appointments for your team members to check when someone will be free for a meeting. When you pull up a client file, you can see all of the matter information, including every email anyone has sent or received along with all documents, research, and notes. This helps save time that you would otherwise spend keeping track of the work other people in the office have (or have not) done.

Chain of Events and Court Rules

Outlook lets you create recurring events. For example, you can schedule a regular staff meeting each Tuesday at 9:00 a.m. PracticeMaster can do that as well, but it can also automatically create a series of appointments and tasks that you can reuse – Calendar Plans. This can be helpful if there are a series of things you need to do each time you open a new case file. It can also be helpful to track court rules or the tasks you need to complete prior to a trial. The items in your calendar plan can automatically be created and scheduled based on a reference date, like the date of a trial. Once created, each task will appear on your calendar or task list based on the time frame calculated from the trial date. If the reference date changes, PracticeMaster will automatically recalculate and adjust dates accordingly.

Cost to Customize

You can get around some of Outlook's limitations through customization (which can be expensive). For a law firm, Outlook cannot approach the level of usefulness that PracticeMaster can offer. Do not try to stuff your client file into a Rolodex. If you want software that helps you manage your practice, you should be using practice management software designed specifically for attorneys.

Fields	Outlook	PracticeMaster
Spouse's Name	Y	Y
Birthday	Y	Y
Name	Y	Y
Address	Y	Y
Phone	Y	Y
Email	Y	Y
Area of Practice	N	Y
Timekeepers	N	Y
Client Number	N	Y
Date of Fee Agreement	N	Y
Verdict / Outcome	N	Y
Statute of Limitations	N	Y
Opposing Attorney	N	Y
County of Filing	N	Y
Jurisdiction	N	Y
Judge	N	Y
Track Fees	N	Y
Track Costs	N	Y
Track multiple matters for a client	N	Y
Automatically associate emails with a matter	N	Y
View a Calendar for everyone in your firm	Exchange Required	Y
Share contacts across your firm	Exchange Required	Y
Share matter information (notes, emails, etc.) across your firm	Exchange Required	Y
Intra-office instant messaging that can link to client and calendar records	Y	Y

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