



# The Ultimate Checklist for Lawyers

A step-by-step guide that supports struggling lawyers in managing their legal practice wisely. And delivering a better service to their clients.



# When Work takes a lot of Work

In today's economy, this is the scenario in which most legal firms operate (and struggle) every day:

- The legal market is flat-lining in terms of growth
- There's a growing need to provide cost-competitive services
- Competition is fierce
- Competition with non-lawyers services firms can be even fiercer
- Clients' requests need to be met in less than no time
- Deadlines are getting tighter
- Commitments tend to overlap and communication with clients (or staff) can be challenging

Sounds familiar? Whether you belong to a large, a small or medium-sized Legal Practice, or you are working solo, you probably struggle to cope with limited demand and increasingly pressing challenges, everyday. If that's true, then you must admit that this statement is also true: **you need to work smarter. You need to create more value with your limited time.**

In today's economy **successful law firms** win only by responding to a client's pain point quickly and efficiently. In a nutshell, they win if they focus on performing better and on delivering value to their clients. **Clients matters come first.** Their work must then be organized by their clients' needs. **Their data and information must be organized by case:** case-specific material, emails, contacts, calendar appointments, notes, memoranda, expenses and so on. All their, and hence, their clients' data, need to be **protected** and **available** within seconds.

Is your Law Firm a smart one already? Or you are still spending yours or your team's time to keep everything under control, instead of building stronger client relationships and winning new business? If you are, **then you have a problem.**

# Serve your clients, not your IT

Ok, so that was the bad news. But the good news is that, by minimally changing the way you operate today, you can save the time you need to solve your clients' problems instead of retrieving documents or accomplishing repetitive administrative tasks by using different tools. How?

By using **one single platform** that integrates case-related documents, alerts and calendars with time-tracking, billing, performance reporting and office administration functionalities. Whether you are only using MS Office or an on-premise practice management tool already, you should consider using one tool that is complete and simple at the same time. One that resides on the **cloud**.

By moving away from traditional desktop- and server-based applications and adopting a **cloud-based practice management solution**, you can not only eliminate large upfront server and licensing costs, but also and foremost keep your data safe from external attacks, environmental damage and loss. And retrieve them anytime and anywhere. So, choose a cloud-based solution and wave goodbye to never-ending discussions with your IT manager or IT consultants. By working on the cloud you'll stop worrying about equipment maintenance costs, hardware life-cycle management and cyber-security. Forever.

## Does your Legal Practice pass the “Forehead Slap” Test?

If it all were so easy. Moving to the cloud is an excellent idea. But it is not enough to make your legal firm more efficient. And profitable.

The following Checklist was developed to help you find the gaps in your case management, time tracking, billing, administrative, communications and IT processes. The Checklist encompasses numerous real-life cases and possible issues, and offers some advice and solutions. It can be helpful for both solo lawyers with few tools and simple processes at their disposal, as well as more structured legal firms already using on-premise (or even cloud-based) solutions for their daily practice management.

The Checklist is structured into 4 main chapters:

- **Processes**
- **Technology**
- **Security**
- **Services**

Spend some thoughts to assess your current situation by answering to the questions in column 1. Follow some simple suggestions to improve your processes in column 2 and find out how **Kleos**, the **cloud-based** and **ready-to-go integrated case management software** by **Wolters Kluwer** can help you fill your process gaps and solve your problems.

# Due Diligence Checklist for your Legal Practice

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## Consider your current **Processes**

Where are you now?	Where you should be	GET THERE WITH KLEOS
Are you having a hard time retriving an important document?	Start using a software that links all your documents, tasks, alerts, emails, calendars, invoices and memoranda to the corresponding case.	Kleos automatically links your cases: documents, emails, events, due dates and tasks, contacts, time sheets, and invoices.
You live by the clock and can't afford missing a deadline or an appointment but are managing all your deadlines in different systems (and inevitably missing some)?	Synchronize all your agendas in one system.	With Kleos you can keep your timesheet updated from your laptop, tablet or smart phone. You can schedule daily, weekly, or monthly alerts so you never miss a deadline again.
How much time do you need to create your contracts, letters and memoranda?	You should consider the idea of adopting a solution to automate the process.	With Kleos you can automate your templates, avoiding to retype content and case data in emails, letters, documents, invoices, grids for data analysis.
Are you still having more collaborators working on the same issue at the same time, whitout even knowing?	Life is easier if collaboration is. And if you know what your staff is working on.	Collaborate efficiently with Kleos: define and assign tasks with deadlines, review appointments, track activities.
How fast can you find and share your cases and documents with colleagues and clients?	Get your data back any minute, by contract, and share cases and documents with your colleagues and clients in a click with a legal practice management software.	With Kleos you can share cases quickly and safely and never lose track of any document or action.
Are you measuring the performance of your legal practice? And how?	If you are using an excel spreadsheet to track the hours spent on a case to invoice accordingly or evaluate your firm's performance, you will inevitably commit mistakes. Choose to automate this activity instead.	Kleos Activity Tracker helps you keep track of the hours you put in a specific case or activity. With Kleos you can automate time-tracking and invoicing and generate reports on the performance of your firm.

# Due Diligence Checklist for your Legal Practice

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## Consider your current **Technology**

Where are you now?	Where you should be	GET THERE WITH KLEOS
<p>How many applications are you using to support your legal practice? Are you able to integrate Microsoft Outlook and Microsoft Office into your clients' case workflow easily? And share calendars and contacts with your colleagues in a few clicks?</p>	<p>All you need is a powerful yet flexible and easy-to-use practice management software to streamline your practice processes that also perfectly integrates with off-the-shelf products like Microsoft Office.</p>	<p>With Kleos you can streamline your practice management while working normally with Microsoft Outlook, Excel, Word: everything is synched in Kleos and integrated with your cases.</p>
<p>Is your current solution intuitive and simple to use?</p>	<p>If you are stressed out by technology, you will never be willing to adopt disruptive, yet life-changing solutions. Choose complete solutions that are also intuitive and easy to use and install.</p>	<p>Kleos is a plug-and-play solution, i.e. it's ready to go: you can immediately start working on it, all you need is an internet connection. It's already easy but it gets easier the more you use it. It also offers tutorials and world-class customer services to get efficient soon.</p>
<p>How difficult would it be to migrate all your data to a new platform?</p>	<p>This is something you really need to take into hard consideration: you don't want to lose your data, and a lot of time (or money) in the process.</p>	<p>Wolters Kluwer can support you in the migration process so that you can be ready to start quickly.</p>
<p>How flexible is your current platform: how easily can you upgrade or downgrade your functionalities (or number of users) according to your changing needs? Is it clear how much it will cost you?</p>	<p>Scalability and Flexibility: bear these two words well in mind when evaluating which solution to choose. Picking up a platform which seemed right at the time but is rigid, might lead to higher hidden costs if you need to upgrade or downgrade.</p>	<p>Kleos is highly flexible and scalable. No firm is too large or too small: Kleos is flexible enough to accommodate all your specific needs and can grow alongside your firm. Kleos is available in 3 packages with different features and responsibilities: you can switch to the best one for you anytime.</p>
<p>Are you currently taking advantage of dead times at work: when commuting to work, when in court, travelling or getting back to the office?</p>	<p>Time is money. The more time you save, the more billable hours you can charge to your clients.</p>	<p>Running your business in the cloud gives you the flexibility to work wherever you are, at whatever time and with whichever device you are using. With Kleos you can.</p>
<p>Can you currently access your cases and documents from outside your office?</p>	<p>If you need a piece of information on the fly, you need a platform that provides you immediate access to it, anywhere, anytime. Get one.</p>	<p>Kleos syncs up in real time to keep all your devices updated with new information.</p>



# Due Diligence Checklist for your Legal Practice

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## Consider your current **Security**

Where are you now?	Where you should be	GET THERE WITH KLEOS
How safe are your data? How can you be sure that no one can breach and steal your data? Does your current provider guarantee safe and secure data back-up?	In the legal industry, security of information is paramount. Protect your firm's, and hence your clients' data. Always.	With Kleos all your data reside in the cloud and can be stored in just one click. Your data are saved in bank grade security servers, hosted in the EU and ISO 27001 certified. Automated back ups run every day. All transactions are certified by McAfee and Norton Security.
Maybe you have top-notch servers and security protocols in place. But what happens if your office sets on fire? Or there's a flood? Do you have an emergency plan in place?	You know it: your firm's and clients' data security is among your biggest assets. It's highly recommended to keep your data safe with the most advanced technologies available on the market including disaster recovery and automated back up.	Again: Kleos saves your data in the cloud, far away from any environmental disaster. Automated back up, disaster recovery and versions control are run 24/7.
How big is your server? Or servers? How often do you need to upgrade them? What if they break down?	So, your server can be big enough to save ages of past data. But are you going to purchase and install an additional one to store your future data every year? You should consider migrating your data to the cloud instead.	And obtain all the space you need for all your data with Kleos unlimited cloud storage.
How secure are your shared data? Are you using emails? Dropbox? Or similar products?	You need a tool that guarantees the highest security when you share a document, with your colleagues or your clients.	Kleos Connect File Sharing Portal is the safest way to share your data with clients and colleagues.

# Due Diligence Checklist for your Legal Practice

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## Consider your current **Services**

Where are you now?	Where you should be	GET THERE WITH KLEOS
How much money are you spending on licenses and maintenance on a yearly basis? Do your providers have a clear terms of service and pricing plan policy?	If you can no longer keep pace with your constantly increasing IT budget, then moving to a cloud-based provider with 'pay-what-you-get' fixed fees is the right move.	Forget about licence and maintenance costs without control and visibility. Your monthly Kleos fee includes it all.
How much help and assistance you need? And you get (for your money)?	Do you ever have the feeling of being alone with your problem? The minute after you purchased a product or service? Well, this should never be the case. You should always feel you are being taken care of.	Our dedicated help-desk is available to help you through set-up and configuration. And to help you solve any problem you might have throughout the duration of your contract. We answer 95% of calls within one minute and more than 80% of queries are resolved with one call. Regular customer surveys help us to improve our service level.
How many product-related training opportunities are you getting for free?	Your job is demanding and you don't have much time left to learn how to use a new tool. Choose one that does not require an excessive amount of training time.	Kleos is very intuitive. But if you feel like you need help, Wolters Kluwer regularly offers free training and webinar opportunities to learn more about Kleos and efficient practice management.
Can you say that your current platform naturally adapts to your profession? On a regular basis?	You should choose a platform that does not prevent you from doing your job because not in compliance with regulatory changes.	Kleos was designed by lawyers for lawyers and evolves along with your profession. Major releases are available every six months and adapted to regulatory changes impacting the law practice
How far can you integrate your software platform with your legal research Data Base?	If you can't, your research process can sensibly slow your work down. This is a no brainer: you don't want this to happen.	Kleos integrates with Wolters Kluwer databases.



# Reconfigure your Law Practice to win

Now, you should take some time to ponder over the answers you gave to the questions in column 1. If you feel like it's high time to control all aspects of your practice, and finally win back the bandwidth you need to work just for your clients, here's what Kleos can do for you:

## What Kleos can do for your Legal Firm

Kleos is the cloud-based practice management software by Wolters Kluwer that makes life easier for small and large legal firms. Find out below what all Kleos functionalities can enable you to accomplish.

### Practice management

- Keep all your cases under control: any document, email, event, due date, task, contact, time sheet, invoice, are now only a click away.
- Manage e-court interactions easily.
- Report on finances and productivity real-time and virtually anywhere.
- Help you stay informed on what your colleagues are working on, in a click.
- Track everyone's activities and register their time, linked to cases and invoicing.
- Customize your diary to get the daily/weekly/monthly outlook and alerts, and share it at need with your colleagues.
- Link everyone's appointments to cases. Synchronize with Outlook.
- Organize and maintain your contacts database.
- Standardize the branding image and quality of service of your firm.



## Document management

- Create and link documents and emails to your case.
- Easily retrieve and access documents from multiple devices.
- Create your own customized templates, avoiding to retype content and case data.
- Keep all the invoices under control.
- Integrate your Wolters Kluwer database into the system and help you work on your cases with all the contents you need: legislation, extensive jurisprudence, advice from best legal experts, forms.

## Client communication

- Share your calendar with your clients and check conflicts easily.
- Optimize time for collaboration with clients by sharing less e-mails and calls.
- Match your customers' needs with flexible business models by Generating invoices based on time sheets or fixed fees.
- Take your office with you, everywhere.

And if you are already using a practice management software, give Kleos a try. Schedule a live demo and find out the difference.

# It's Kleos Time

Kleos is the cloud-based practice management software by Wolters Kluwer, which has led the way in legal software for over 30 years and is committed to ongoing innovation to help you work more effectively. More than 10.000 legal professionals use Kleos every day. Now it's your turn.

Change can be minimally disruptive but can create momentous. If you think it's time you started to automate your routine practice processes and spend time on high-level, strategic and, above all, billable activities, then it's time for Kleos. Go back to the heart of practice management. Go back to being a lawyer: Kleos will take care of the rest.

See **Kleos** in action

[www.kleos.wolterskluwer.com/en](http://www.kleos.wolterskluwer.com/en)

*Find out more about Kleos and visit:  
[kleos.wolterskluwer.com](http://kleos.wolterskluwer.com)*