

How Attorneys Boost Productivity with Rocket Matter



rocket matter

Introduction

From the moment I started working with attorneys more than ten years ago, it was clear to me that the profession needed serious help with productivity and efficiency.

This observation informed the overriding philosophy of Rocket Matter's product as well our educational content. It's what led us to build our product with powerful automated tools and led me to co-author [The Lean Law Firm](#) for the American Bar Association.

What follows in this eBook are real-world examples of attorneys who are using our product. The quotes are from actual practitioners, and we paired their comments with information about the particular features that help them.

I'm always looking to hear from attorneys and other legal professionals about what helps them to be more productive, efficient, and profitable. I encourage you to reach out to me and let me know any tips and tricks you'd be willing to share with the profession.

Larry Port

CEO, Rocket Matter

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Feature: Time Keeping

“We use one of the foundational elements of Rocket Matter to help with productivity: Time keeping. For many years we did not track time—I really didn’t want to do it as most of our clients are flat fee. But the fact of the matter is that in order to measure our output, to determine how long it takes us to complete certain matters, and to measure my team’s performance, we needed to start time tracking regularly. Rocket Matter makes it so easy to do this. Plus, I really love the ability to use that data to make sure I am hitting the amount of billable hours per day/week.”

—Rachel Schaffer Lawson, owner of Schaffer Law Firm, PLLC, which focuses on helping small businesses and food service businesses in Nashville, Tennessee

No more scrounging through emails, calendar events, and legal pads scattered across the office in an attempt to reconstitute your billing for the month. [Our Bill-As-You-Work™](#) technology makes time capture a breeze.

Rocket Matter offers your more than nine different ways to bill for your time, including multiple timers and billing for calendar events, tasks, emails, and phone messages. You can also easily add LEDES codes anywhere in our system where you bill for time! Here's how it works:

The screenshot shows the 'Add Time or Expense' form with the following details:

- Type:** Time (checked), Coet, Flat Fee
- Description:** Review client documents (Multiline checked)
- Client: Matter:** Sky Bros : Hobbs Complaint
- Billing Date:** 08/01/2018
- Bill By:** Sally Ann Jones
- Billing rate:** \$100.00 /hr
- Billable units:** .5
- Total:** \$50.00
- Tags:** (empty field with + button)
- Billing Options:** Do Not Charge, Non Billable

1. Confirm the billing type desired and add a description (this will appear on your invoice.)
2. Enter the client and matter information as well as a billing date.
3. Specify the the bill by user, billing rate, and billable units (if applicable.)
4. You can also choose the “Do Not Charge” or “Non-Billable” option.
5. Hit “Save” or “Save & Add Another” to add another time entry.



Feature: Batch Billing

"The biggest thing Rocket Matter helps us with is running bills. Running bills used to be the biggest pain, but now we can run bills in ten minutes or less and run them the last day of each month religiously. Regular billing has increased our collections significantly."

—Patrick Slaughter, co-founder of LaFevor & Slaughter, a family law and immigration firm in Knoxville, Tennessee

With [Batch Billing](#), all of your client bills are created in one fell swoop in PDF, Word,® WordPerfect®, or Excel® formats. You can review your billing history at any time and see what charges went out when. You'll be more productive than ever before since you can process your bills *while* you work!

The screenshot displays the 'Batch Billing' interface in Rocket Matter. At the top, there's a search bar and navigation tabs for 'My Dashboard', 'Billing Dashboard', and 'Batch Billing'. Below this, a 'Batch Billing Options' section provides instructions: 'Use the settings and filters below to generate a list of matters. You can then fine tune your list and run a batch of invoices for them.' The interface is divided into several sections: 'Batch Type' (with options like 'Matters with current charges', 'Matters with no current charges that have unpaid invoices', 'Invoice', 'Statement', 'Include original invoice(s)', and 'Unpaid invoice statement'), 'Matters that owe more than' (with a dollar amount input), 'For Clients' (with a dropdown menu), 'Start Date' and 'End Date' (with date pickers), 'Filter by Matter Custom Field' (with 'Field Name' and 'Field Value' inputs), 'Days since invoice was generated' (with a numeric input), and 'Billing Type' (with options like 'Hourly', 'Flat Fee', and 'Contingency'). A 'Communicator' button is visible in the bottom right corner.

1. Run a batch of statements or invoices [.rocketmatter.com/legal-bi](https://www.rocketmatter.com/legal-bi) instead of billing on a per matter basis. Select from a plethora of filtering options to produce a granular result.
2. Generate and view unpaid invoice statements for clients with outstanding balances.
3. Filter by matter custom field for specialized billing.

Share your invoices and statements via email or send them directly to your client's portal.



Feature: Payment Processing

“I absolutely love Rocket Matter Payments. It was a breeze to get set up, and it’s so simple to use. Plus, I don’t have to go between two applications to record funds that are received. It’s all right there in my practice management software, Rocket Matter. Also, the rates are much better than what I was paying my previous processor.”

—Lauren Rowe, owner of The Law Offices of Lauren Taylor Rowe, a family law and personal injury firm in Kansas City, Missouri

[Rocket Matter Payments](#) is a fully-integrated payment processing system that helps simplify and automate the difficult process of invoicing your clients and getting paid. It allows you to effortlessly increase your collections while continuing to focus on what you do best: Practicing law.

Collect payments in your office, on your website, or even on the go. Your clients can pay via credit card or eCheck directly from your emailed invoices! When payments are made, payments are automatically updated in the matter ledger, thus reducing administrative error while saving time!

Jones, Bierko, & Hill
(561) 445-7766
1515 S. Federal Highway, Boca Raton, FL, 33434

Open invoice for Sky Bros

Invoice Date	8/1/2018
Invoice Number	10008
Matter Name	Hobbs Complaint
Status	Payment due
Invoice Charges	\$2777.94
Past Due Charges	\$0.00
Account Balance as of 08/01/2018	\$2777.94
Retainer Due	\$0.00
Total Due	\$2777.94

Payment Information

🔒 128 bit SSL Encryption. You're safe.
Use the form below to pay your invoice.

Payment amount
\$2777.94

Credit card E-Check

Name as printed on card
Sky Bros

Street Address

City _____ State _____

Zip Code _____ Country _____

Credit card number
_____ 

Expiration Date MM/YY _____ CVW _____ 

Review

With Rocket Matter Payments, you'll have enhanced billing and collections functionalities including Alternative Fee Arrangements. Payment Plans help you automate collections on past due amounts, while Recurring Billing also makes getting paid so much easier.

Sky Bros > Hobbs Complaint

Recurring Billing & Payment Plan

To setup Recurring Billing or a Payment Plan, select from the options below and click Next Step.

Payment	When	Amount
Payment 1	04/24/2017	\$637.50
Payment 2	04/24/2017 00:00:01	\$637.50
Payment 3	04/24/2017 00:00:02	\$637.50
Payment 4	04/24/2017 00:00:03	\$637.50
Payment 5	04/24/2017 00:00:04	\$637.50
Payment 6	04/24/2017 00:00:05	\$637.50
Payment 7	04/24/2017 00:00:06	\$637.50
Payment 8	04/24/2017 00:00:07	\$637.50
Payment 9	04/24/2017 00:00:08	\$637.50
Payment 10	04/24/2017 00:00:09	\$637.50

« < 1 2 3 > »

Payment Plan Details

Plan Type	Recurring Billing
Accounting Method	Operating
Date of first Payment	04/24/2017
Plan amount *	\$600
Number of Payments	24

Payment Terms

Charge equal monthly payments

Payment Failure Email Recipients

+

Who shall receive invoices and or receipts for this matter?

Craig Max Bierko
✎ ✕

Address - Office: cbierko@test_law26.com

[Add another](#)

* Monthly payment amount will include taxes if applicable

Go Back
Start Plan

Rocket Matter Payments helps your firm save on processing fees and enhances your clients' overall customer experience. Our intuitive legal billing software provides your firm with Big Law transactional capabilities and makes getting paid a breeze.



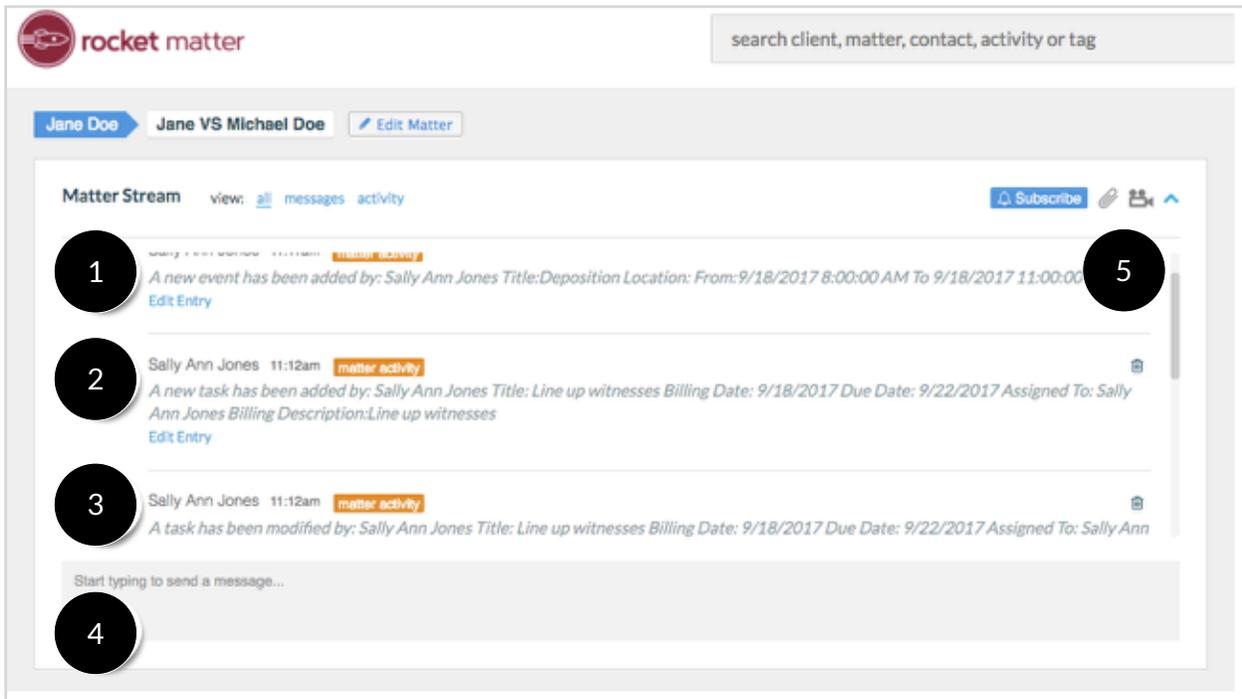
Feature: Matter Stream

"We recently started uploading documents into Rocket Matter's matter stream. This enables the attorney to click right on the document to view it from any location on their mobile app quickly and easily rather than having to locate it in our electronic document filing system. Pleadings, letters, and any documents received from the client are all right on the matter page! We've found it to be a really great feature!"

—Brenda W. Dedmon who works at Murphy Law Group, P.C., which focuses on landlord-tenant law in Portland, Oregon

Rocket Matter's [Communicator](#) feature allows you to organize your conversations on a matter-by-matter basis. When you do this, the conversation will appear as a stream in your Matter Dashboard. You can also view much more than just your messages for a matter: You can see the activity going on for a particular case as well.

What appears in the matter stream?



The screenshot shows the Rocket Matter interface for a matter titled "Jane VS Michael Doe". At the top, there is a search bar and a "rocket matter" logo. Below the matter name, there are tabs for "Jane Doe" and "Jane VS Michael Doe", along with an "Edit Matter" button. The main area is titled "Matter Stream" and has a view selector set to "all" (with options for "messages" and "activity"). There are also "Subscribe", "Share", and "Refresh" icons. The stream contains three entries, each with a "matter activity" tag and an "Edit Entry" link:

- 1. A new event has been added by: Sally Ann Jones Title: Deposition Location: From: 9/18/2017 8:00:00 AM To 9/18/2017 11:00:00 AM
- 2. A new task has been added by: Sally Ann Jones Title: Line up witnesses Billing Date: 9/18/2017 Due Date: 9/22/2017 Assigned To: Sally Ann Jones Billing Description: Line up witnesses
- 3. A task has been modified by: Sally Ann Jones Title: Line up witnesses Billing Date: 9/18/2017 Due Date: 9/22/2017 Assigned To: Sally Ann Jones

At the bottom, there is a text input field with the placeholder "Start typing to send a message...".

1. New tasks
2. New events
3. Billable entries (hourly, expenses, flat fees)
4. Any text messages that are typed directly into the stream
5. Documents



Feature: Tasks and To-Do's

"We have started using Rocket Matter tasks to organize our firm's weekly case meeting. This has made the process much quicker, and it helps us make sure we are on top of all our tasks."

—Jim Bulger, a personal injury and employment lawyer in Beverly Hills

[Adding a task](#) is quick and easy. You can create a task from any page within Rocket Matter by clicking the “+Add New” button on the top right corner of the screen.

The screenshot shows the 'Add Task' modal form with the following fields and callouts:

- 1**: Task Title field containing 'Update financial affidavit'.
- 2**: Client : Matter field containing 'Sky Bros : Hobbs Complaint'.
- 3**: Billing Date field containing '08/09/2018' and Due Date field containing '08/09/2018'.
- 4**: A timer section with a play button, a numeric input field containing '0', and a time input field containing '00:00:00'. Below the timer are two toggle switches: 'Non Billable' (checked) and 'No charge' (unchecked).
- 5**: Assigned To/Billing User field containing 'Sally Ann Jones'.

Other fields include 'Billing Description' (containing 'Update to latest version') and 'Tags' (with a plus sign button). At the bottom right are 'Cancel' and 'Save' buttons.

1. Add a task title and enter the matter for which you need to complete the task.
2. Select your billing date and (optional) due date.
3. Specify who the task is meant to be completed by and add a billing description.
4. You can also run a timer while you complete the task to bill for your time!
5. Click “Save” once all data is entered.

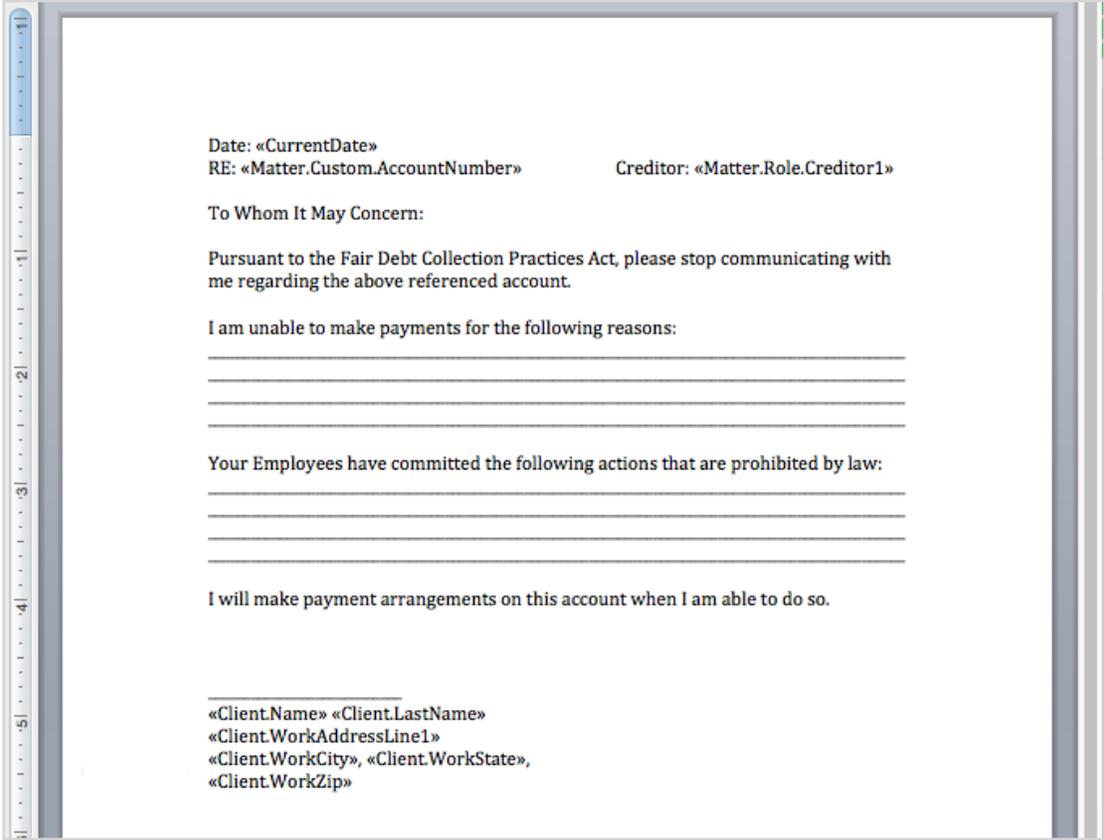


Feature: Document Templates

“I save time by using document templates. It takes little effort to create forms for pleadings or contracts that you use over and over.”

–Sherman Brod, a trial attorney in Tampa

Creating [document templates](#) saves you a ton of time: It's much quicker to produce a document with a few clicks instead of having to dig around looking for a similar document, opening it, and then copying the information you need into a new document. Plus, it reduces the risk of making errors!



Templates are created as Word documents and populated with either standard or custom Rocket Matter 'document merge fields.' A comprehensive merge field list can be downloaded directly from the Admin section within your Rocket Matter settings.



Feature: Project Management

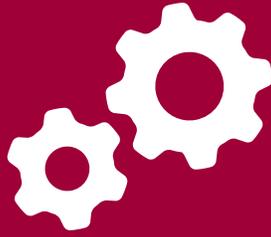
"We have been using Rocket Matter since 2012 to track our open matters, bill clients, accept payments online, and organize our calendars. Whenever a client calls, anyone in our firm can look up the matter status and answer questions right away. The newer Matter Templates and Project Management features also help keep us on schedule for each matter. We are a single attorney firm, and Rocket Matter helps us manage more than 380 open cases."

—Karen Brady, an attorney who practices estate planning and business planning at her firm in Arvada, Colorado

[Rocket Project Management](#) enables attorneys to easily create transitions between different phases of a case. Each phase can contain its own calendar calculations, custom data, and tasks, allowing legal professionals to set up automated systems so that they never miss deadlines. When a matter is switched from one phase to another, all of this predefined data automatically appears in Rocket Matter.

From Status	To Status	Order
Auto - Litigation	Can transition to → File Closed	⬆️ ✖️
Auto - Settlement	Can transition to → File Closed	⬆️ ✖️
Auto - Demand	Can transition to → Auto - Litigation	⬆️ ✖️
Auto - Demand	Can transition to → Auto - Settlement	⬆️ ✖️
No Status	Can transition to → New Case Intake	⬆️ ✖️
New Case Intake	Can transition to → Auto - Client Receiving Treatment	⬆️ ✖️
Auto - Client Receiving Treatment	Can transition to → Auto - Demand	⬆️ ✖️

Along with the workflows, you'll have access to sophisticated reporting about the status of the matters going through phases. For example, legal professionals can easily tell how many matters are in each phase, which are on schedule, and which are overdue. Rocket Project Management integrates with Rocket Matter's Communicator, the software's internal messaging tool, alerting lawyers on their mobile devices when the status of a case has changed.



Feature: Integrations

"As a small firm, we have no room for anything that slows down productivity. Rocket Matter has been with us since the beginning and provides us an effective way to track our time, bill our clients, collect fees online, and keep up with all our matters. We especially appreciate the integration with emails, calendaring, and secure document storage as a backup system."

—Maytel Sorondo Bonham, whose firm focuses on family law, estate planning, probate, and personal injury in Orlando, Florida

When you use Rocket Matter, there's no need to give up all the other great applications out there that help you stay organized and productive. In fact, our software [integrates with lots of apps](#) that you already use to make you more productive than ever:





Feature: Unlimited File Storage

"Our firm has made great use of Rocket Matter's cloud document storage. Our attorneys travel all over the world for military cases and this feature allows us to travel without having to carry paper files."

—R. Davis Younts, who practices military law and criminal defense in Harrisburg, Pennsylvania

Rocket Matter offers unlimited document storage! Documents are linked to a specific matter and uploaded to the Matter Documents section that you designate during the document upload. You can store many types of items within the Matter Document section, including files, urls, and videos.

Start by clicking “+Add New” on the top right corner of any screen within Rocket Matter and select “Files or URL.”

The screenshot shows a modal window titled "Add New File" with two tabs: "Files" (selected) and "URL". Below the title bar, there is a text input field labeled "Client : Matter" with a circular callout "1" pointing to it. Below the input field is a large dashed rectangular area with a circular callout "2" and the text "Drag and drop files or folders or click to browse files". At the bottom right of the dialog is a green "Done" button with a circular callout "3" pointing to it.

1. Designate the location you wish to upload by entering the “Client: Matter” name.
2. Drag and drop your file onto the page or click to browse and upload files from your computer.
3. Click “Done” to finish the upload process.



Feature: Reporting and Analytics

“As an associate in a small firm, this is an optimal way for me to gauge both my active/billable work, as well as the ‘behind the scenes’ and administrative work that is required in a small firm. It has been helpful to see when and where billable time can be lost to logistics and administration, which allows for tweaks and, ultimately, more billable hours.”

—Megan Rovner, an attorney at The Orlofsky Law Firm, P.L.

With Rocket Matter, you will understand your business like the CEO of an Am Law 100 law firm. Rocket Matter's law practice management software helps you manage your finances quickly and analyze your data easily with our Advanced Analytics and Business Intelligence Tool.

ClientName	MatterName	BillingUser	Type	ActivityDescription	BillableUnits	Rate	SUM(Amount)	SUM(Collected)
1. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Draft letter for client	1.50	200.00	300.00	0.00
2. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Consultation about probate issue	2.00	200.00	400.00	0.00
3. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Research update and revision	3.00	200.00	600.00	0.00
4. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Call to opposing counsel	0.20	200.00	40.00	0.00
5. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Discovery discussion with client	0.30	200.00	60.00	0.00
6. Sky Printing Press	Libel suit	Craig Max Bierko	Timer	Addressed concerns about client's case	4.20	200.00	840.00	0.00

You can export any of your reports to Microsoft Excel, allowing you to organize your data to suit your particular needs. You can design your own report using our Business Intelligence tool or use our included pre-built reports, including:

- Origination Report
- Allocation Report
- Matter Budget
- Productivity Per User
- Productivity Per Matter
- Collections Report
- And More!

About Rocket Matter

Rocket Matter helps law firms offer better client service and also increase revenues by more than 20%. The company was the first cloud-based legal practice management software on the market, landing its first client in 2007. It has been a leader ever since.

Rocket Matter has the most powerful, easy-to-use time and billing software in the industry. Also, when law firms want to make more money, go paperless, or increase confidence in their trust accounting, Rocket Matter helps them achieve those goals. With award-winning customer service based in the United States, it's no wonder thousands of law firms swear by Rocket Matter.

Enjoy this book and become part of our cutting edge community on [Facebook](#), [LinkedIn](#), and [Twitter](#). Also, check out our [Legal Productivity blog](#).

See Rocket Matter in Action Today!



Schedule a free personalized demo and see how Rocket Matter can boost your productivity!

Book a Demo Now!

or call 866-710-1845 today!