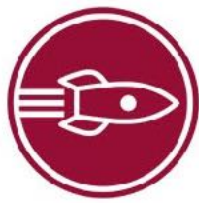


# Top Eight Ways Rocket Matter Can Increase Your Profits



rocket matter



rocket matter

# Get Paid Faster and Boost Firm Revenue by 20% with Rocket Matter.

Our automated billing and collection tools mean you don't just bill faster, you get paid faster.

Start your FREE 7-day trial today >

The screenshot displays the Rocket Matter dashboard. On the left is a dark sidebar with navigation links: Dashboard, Matters, Contacts, Calendar, Tasks, Documents, Billing, Reports, Messages (2), My Profile, Settings, Help, Achievements, and Sign Out. The main content area has a top header with the Rocket Matter logo, a search bar, and buttons for '+ Add New', currency, and clock. Below the header, the 'My Dashboard' section includes a calendar for June 2016 (showing the 6th as the current date) and a 'Matter Quick Add' form with fields for Client, Matter Name, and radio buttons for Person/Business. To the right of the dashboard are three summary cards: 'User Billing' showing 0.00 hours billed today, 'Firm Billing' showing a Trust Balance of \$10,408.00, and 'Pending Invoicing' showing a Pending Subtotal of \$1,575.00 and a Pending Total of \$1,575.00. A 'Task Listing' section at the bottom shows a list of tasks with checkboxes, descriptions, and due dates.

# Introduction

When it comes to profitability in law firms, I've got some good news and some bad news.

First, the good news: Lawyers can now talk about profitability and revenue without violating unwritten rules of decorum about running a law firm.

But here's the bad news: Decades of zero dialog about the business of law have left lawyers very unprepared for the dynamic shifts we are witnessing across all industries.

As much as I cringe when I hear the overused term "disruption," I have to admit that that's exactly what's going on. Whether you run a hotel, taxi company, medical practice, or pretty much any business, the truth is the world is changing and we all need to adapt along with it.

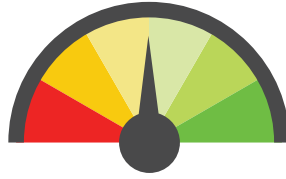
And that includes legal services.

Through my work at my legal practice management software company, [Rocket Matter](#), I've worked with thousands of law firms for more than ten years. My team knows what best practices look like. We've seen what happens when lawyers take business techniques and inject them into their practices, and we have witnessed first-hand how law firms can vastly improve their finances by doing this, sometimes tripling their revenue with our help. In other words, Rocket Matter is here to help make running a law firm easy. With a few simple ideas and some well-designed tools, we can help your firm boost profits and maximize revenues.

Our clients have told us which of our features help them increase profitability the most. This book delves into the best of the best.

For those of you who enjoy the lessons in this book and want to dive into an even deeper exploration of law firm operations, I invite you to also take a look at the #1 bestselling book I co-authored with attorney Dave Maxfield, [The Lean Law Firm](#).

Larry Port  
CEO and Founder of Rocket Matter



# Comprehensive Matter Dashboards

You should always be able to quickly track and understand your clients' matters at a glance, including all finances involved. With Rocket Matter, you can easily access a matter's calendar events, tasks, related contacts, time and billing information, and account balances from your matter dashboard. This lets you know where you stand financially with each case.

Welcome Sally  
Tue October 18, 2016

rocket matter

search client, matter, contact, activity or tag

+ Add New

Dashboard Settings

My Dashboard

OCTOBER 2016

October 18, 2016

Date	Event Title	Client : Matter
08:00 AM - 10:00 AM	Breakfast meeting with Hobbs re Depo prep	Sky Bros : Hobbs Complaint
08:15 AM - 09:15 AM	Sally to touch base with Zuckerloern	Sky Bros : Crown Forklift Accident
04:30 PM - 05:30 PM	Depo of Burt Hobbs	Sky Bros : Hobbs Complaint

Task Listing

Viewing: Reading Due

Display: 10 Items

- ☐ File Motion  
Kelsey Burke : DUI  
Created by: S.A.J.  
Due: Oct 13 2016
- ☐ Prepare Pretrial Statement  
Nathan Jordan : Jordan, Nathan v. Jordan, Alex  
Created by: S.A.J.  
Due: Oct 21 2016
- ☐ Send docs via courier to Port  
Sky Bros : Hobbs Complaint  
Created by: S.A.J.  
Tags: Priority  
Due: Oct 17 2016

You have been assigned a new task. Click to View

- ☐ Westlaw research precedents  
Sky Bros : Crown Forklift Accident  
Created by: S.A.J.  
Due: Oct 17 2016

Matter Quick Add

Client

Person Business

Matter Name

+ Add Matter

User Billing

6.30

Firm Billing

Total Balance

\$13,898.00

Pending Invoicing

Pending Subtotal

\$5,527.00

Pending Taxes

\$120.94

See it in Action!





## Bill-as-you-Work™

If you try to scrounge through old emails, calendar events, and documents to figure out your billing for month, you're very likely missing out on a lot of billable time. And those minutes certainly add up quickly! However, with Rocket Matter's Bill-as-you-Work technology, time capture is simple: Everything in the software prompts you to add time, whether you're adding a calendar event, creating a task, or writing notes on a case. Also, editing time after your events take place requires two simple clicks. This is just another way Rocket Matter makes billing a breeze.

Add Time or Expense

Type

☒ Time ☐ Cost ☐ Flat Fee

Description

☒ Multiline

Research conducted for upcoming trial

Client: Matter

Sky Bros : Hobbs Complaint

Billing Date

09/24/2018

Bill By

Sally Ann Jones

Billing rate

\$100.00 /hr

Billable units

2.5

Total \$250.00

Tags

+

Billing Options

☐ Do Not Charge ☐ Non Billable

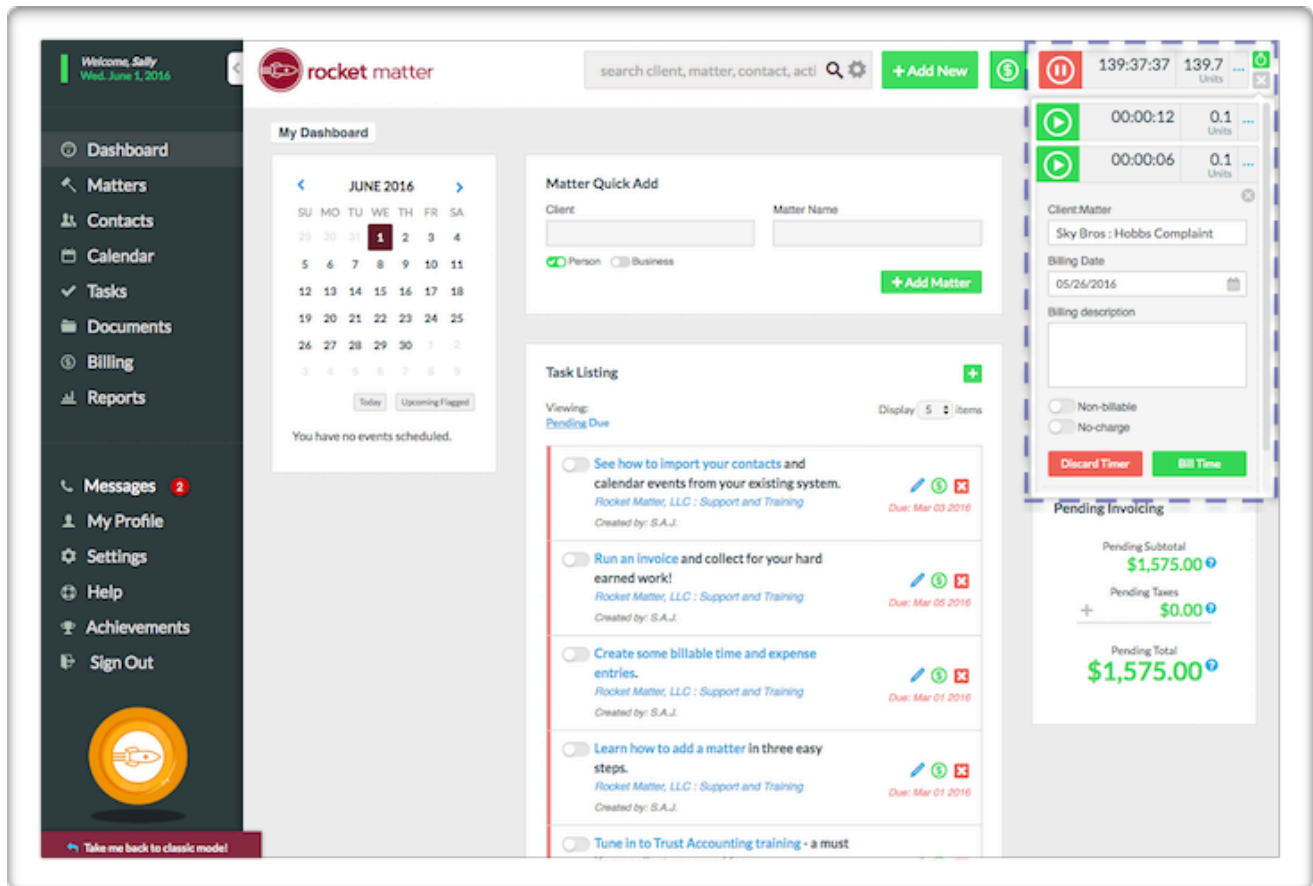
Cancel

Save & Add Another

Save



Another bonus: You can multitask and still keep track of all your time. With Rocket Matter's multiple timers feature, you can run a timer to quickly log your time and out-of-pocket expenses and associate them with a matter. Then, pause your timer and start another one for another matter. Open as many timers as you need. Your billable time is easily tracked across multiple matters and invoicing is very simple.



See it in Action!

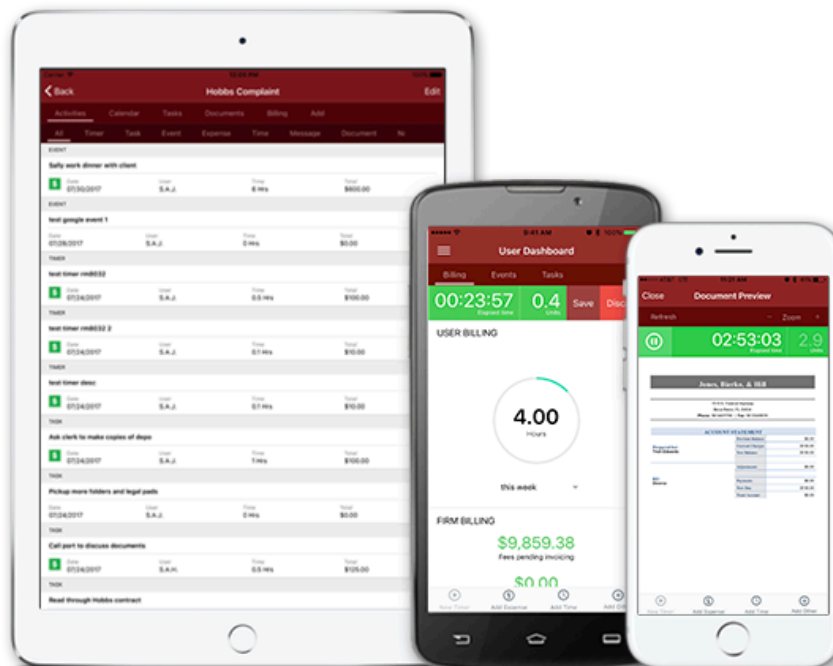




## Mobile Time and Expense Capture

One of the easiest ways to boost revenue for your law firm is by accurately capturing time—even when you're away from the office. With Rocket Matter's iPhone and Android mobile apps, you can quickly run a timer no matter where you are. You can also fire off a time entry or an expense as you walk into a hearing or deposition.

Rocket Matter has now made it even simpler to get started with their mobile software. Just download the app from either Apple or the Google Play Store and create your account. In minutes, you'll be up and running with a free trial that allows you to run your firm from your smartphone.





## Batch Billing

When lawyers say they get their bills out in 30 minutes, it's because they're Rocket Matter customers using batch billing. All of your client bills are created in one fell swoop, in PDF, Word,<sup>®</sup> WordPerfect<sup>®</sup>, or Excel<sup>®</sup> formats. We store your invoices online for you, so that at any time you can review your billing history and see what charges went out when.

Get Answer

Pre-bill

Invoices

Reset

Report Summary

Current Charges

\$5,527.00

Tax Amount

\$120.94

Total Due

\$7,397.94

Total Due Covered by Trust

\$5,062.94

Export

☒ group by client

<input checked="" type="checkbox"/>	First Name/Company	Last Name	Matter	Balance	Current Charges	Tax Amount	Total Due	Currently Available In Trust	Matter Balance After Invoice	Trust Balance After Invoice
<input checked="" type="checkbox"/>	Christian	Cosia	Aggravated Assault	\$0.00	\$900.00	\$0.00	\$900.00	\$0.00	\$900.00	\$0.00
<input checked="" type="checkbox"/>	Casarov	Geasaway	HF Violation	\$0.00	\$65.00	\$0.00	\$65.00	\$0.00	\$65.00	\$0.00
<input checked="" type="checkbox"/>	Jake, S.	Napora	Bankruptcy Proceedings	\$1,750.00	\$0.00	\$0.00	\$1,750.00	\$0.00	\$1,750.00	\$0.00
<input checked="" type="checkbox"/>	Lisa	LePore	Estate Planning	\$0.00	\$400.00	\$0.00	\$400.00	\$1,325.00	\$0.00	\$325.00
<input checked="" type="checkbox"/>	Nathan	Jordan	Jordan, Nathan v. Jordan, Nina	\$0.00	\$730.00	\$0.00	\$730.00	\$3,000.00	\$0.00	\$2,270.00
<input checked="" type="checkbox"/>	Peggy Sue	de la Hoya, Esq.	Shethler Property on West 57th	\$0.00	\$1,550.00	\$0.00	\$1,550.00	\$5,000.00	\$0.00	\$3,450.00
<input checked="" type="checkbox"/>	Sky Bros		Hobbs Complaint	\$0.00	\$1,977.00	\$120.94	\$2,097.94	\$4,573.00	\$0.00	\$2,475.06
<input checked="" type="checkbox"/>	Sky Bros		Grow Hurlitt Accident	\$0.00	\$100.00	\$0.00	\$100.00	\$2,475.06	\$0.00	\$2,375.06
<input checked="" type="checkbox"/>	Sky Bros		Riley Workmen's Compensation	\$0.00	\$175.00	\$0.00	\$175.00	\$2,375.06	\$0.00	\$2,200.06




At Rocket Matter, we think of your invoice as something more than just a request for payment. It's also an important way to communicate with clients —so it needs to match your personality and convey exactly what you want to convey.

Page 1 of 6

Jones, Bierko, & Hill

1515 S. Federal Highway Boca Raton, FL 33434  
Phone: 561.445.7766 | Fax: 561.349.978



**ACCOUNT STATEMENT**

Previous Balance	\$1,002.00
Current Charges	\$2,735.44
New Balance	\$3,737.44
Adjustments	\$0.00
Payments	(\$2,735.44)
Now Due	\$0.00


Prepared for:  
Sky Bros

RE:  
Hobbs Complaint

Page 2 of 6

Jones, Bierko, & Hill

1515 S. Federal Highway Boca Raton, FL 33434  
Phone: 561.445.7766 | Fax: 561.349.978



**INVOICE**

Invoice Date	August 31, 2016
Invoice Number	10008
Invoice Amount	\$2,735.44

Sky Bros  
400 Sky Place  
Altoona, PA 16601  
United States

**Matters: Hobbs Complaint**

		Attorney's Fees	
2/28/2014	Motion to dismiss	S.A.J.	2.00
3/31/2014	Billing issue straightened out	S.A.J.	2.50
4/16/2014	Call port to discuss documents	S.A.H.	0.50
4/28/2014	Conversation about client's satisfaction with the firm	S.A.J.	0.50
5/01/2014	Explained case documents in details	S.A.J.	0.50
5/07/2014	Ask clerk to make copies of depo	S.A.J.	1.00
5/09/2014	Client concerned about speed of proceedings	S.A.J.	0.50
5/28/2014	Discovery work	S.A.J.	5.00
6/08/2014	Discussion about jury	S.A.J.	1.00
8/31/2014	Deposition	S.A.J.	2.00
9/19/2014	Meeting w/ Opposing Counsel	S.A.J.	1.00
9/7/2016	Breakfast meeting with Hobbs re Depo prep	S.A.J.	2.00
9/8/2016	Call to discuss new evidence	S.A.J.	2.00
9/8/2016	Call to discuss new evidence	C.M.B.	2.00
<b>SUBTOTAL</b>		22.60	\$2,635.00

		Costs	
5/29/2014	Postage		\$0.00
<b>SUBTOTAL</b>			\$0.00

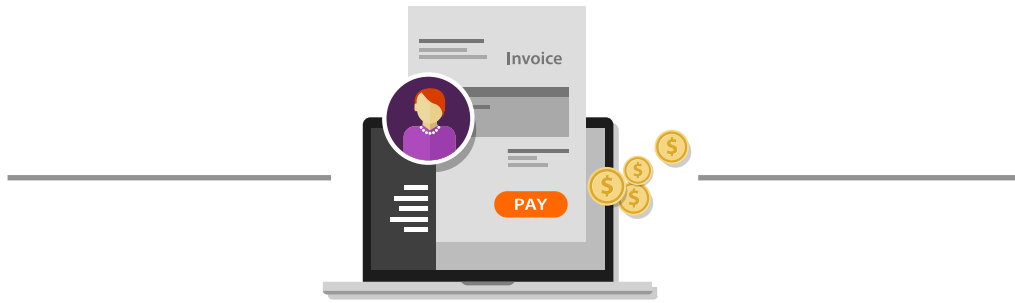
**Matter Ledgers**

9/27/2013	Balance before last invoice	\$0.00
9/27/2013	Invoice 9491	\$1,002.00

Many law firms like our professional, out-of-the box legal invoices. Others prefer to bring their own stationary, logos, and fonts into the mix. Some want a remittance stub to fit a certain envelope size. Whatever your needs, we've got it covered.

See it in Action!





# Electronic Invoicing and Payment Processing

In this day and age, if you don't accept credit cards or eCheck payments and you're stilling waiting for clients to send checks, you're delaying payment. What's worse, you can actually lose money: A study by Intuit estimates that businesses that don't accept credit cards lose out on approximately \$7,000 in sales each year. Plus, you're using outdated methods, and 21st century clients want to pay their bills with credit cards. It's easy and builds rewards points.

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

**Open invoice for James Craddock**

Invoice Date	1/27/2016
Invoice Number	10007
Matter Name	Armed Robbery
Current Charges	\$500
Retainer Due	\$0
Invoice Total Due	\$500

[Use test credit card](#)

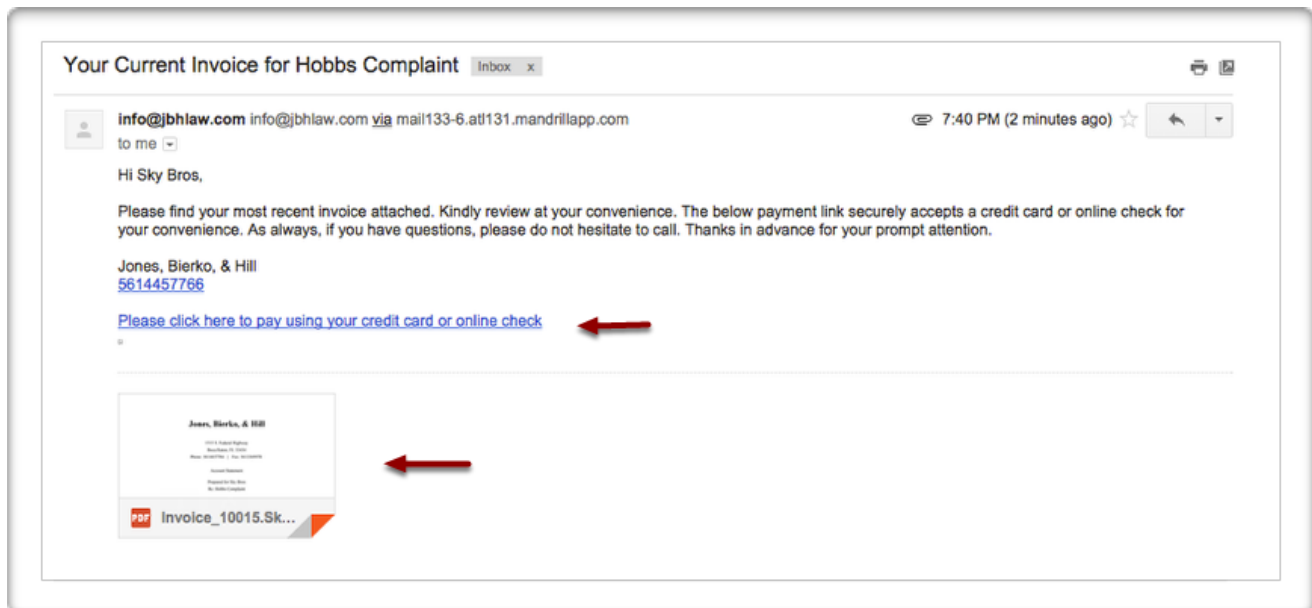
**Payment Information**

128 bit SSL Encryption. You're safe.  
Use the form below to pay your invoice via credit card or checking account.

Payment amount  
\$500.00

☒ Credit card ☐ Checking

Rocket Matter Payments, which is fully integrated with our software, is an incredibly powerful way for law firms to boost profitability. For starters, our software makes it a cinch to track time and generate and send out invoices. (No need to print invoices, stuff them into envelopes, address and stamp the envelopes, and then put them in the mail!)



You'll also get paid faster. When law firms receive a credit card payment through Rocket Matter Payments, they'll receive money in their bank account the next day.

What's more, when you sign up for Rocket Matter Payments, you'll have enhanced billing and collections functionalities. Payment plans help you automate collections on past due amounts, while recurring billing helps you accommodate alternative fee arrangements that makes getting paid so much easier. When you customize payment plans and recurring billing, you can add the client's bank account or credit card information, specify if funds should go into trust or an operating account, and indicate the duration of the cycle. Then, you're done!

In other words, your client is automatically billed on a monthly basis and the payment goes through without your having to do a thing.

See it in Action!





## Recurring Billing and Payment Plans

If you're flexible when it comes to how your clients pay you, it's a win-win: Not only will it make your clients happy, but you'll also greatly increase the odds that you'll actually get paid on time. Also, while the billable hour can be great, it has an inherent limit: Your time.

### Recurring Billing & Payment Plan


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

#### Plan Details


**Total Amount to be paid**

For your convenience we have pre-populated the current account balance. You can change this amount.

**Date of first Payment**



**Payment Failure Email Recipients**



#### Payment Terms

☒ Charge client equal monthly payments

**Number of Payments**

☐ Charge client a specified monthly amount until total amount is paid off

☐ Charge client an initial amount up front and charge the difference in equal monthly payments

#### Automatic Billing

☒ Would you like to charge automatically?

☒ Credit card ☐ E-Check

**Name as printed on card**

**Street Address**

**City**  **State**

**Zip Code**  **Country**

**Credit card number**

That's why alternative fee arrangements (AFAs) are something law firms should definitely consider. They allow you to balance your client's interests and needs with the demands of running a law practice. They keep your clients happy and your cash flow consistent and predictable. Here are some great options:

## Payment Plans

A payment plan is one of the best ways to collect revenues. With payment plans, lawyers can set an amount for an invoice and charge clients on a monthly basis until the balance is paid off.

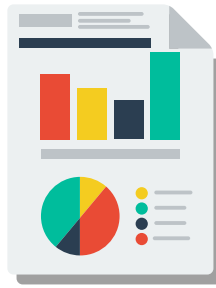
This arrangement is perfect for times when a client cannot pay large bills upfront but can pay in increments, which is commonly the case with Immigration attorneys, Criminal Defense attorneys, or any litigators who generate large bills.

## Recurring Billing

With recurring billing (also known as subscription pricing), your client pays you a set amount of money every month to handle normal legal interactions. This is great for customers because they have a predictable line item on their P&L, while it's great for firms because it helps you get paid on a regular basis.

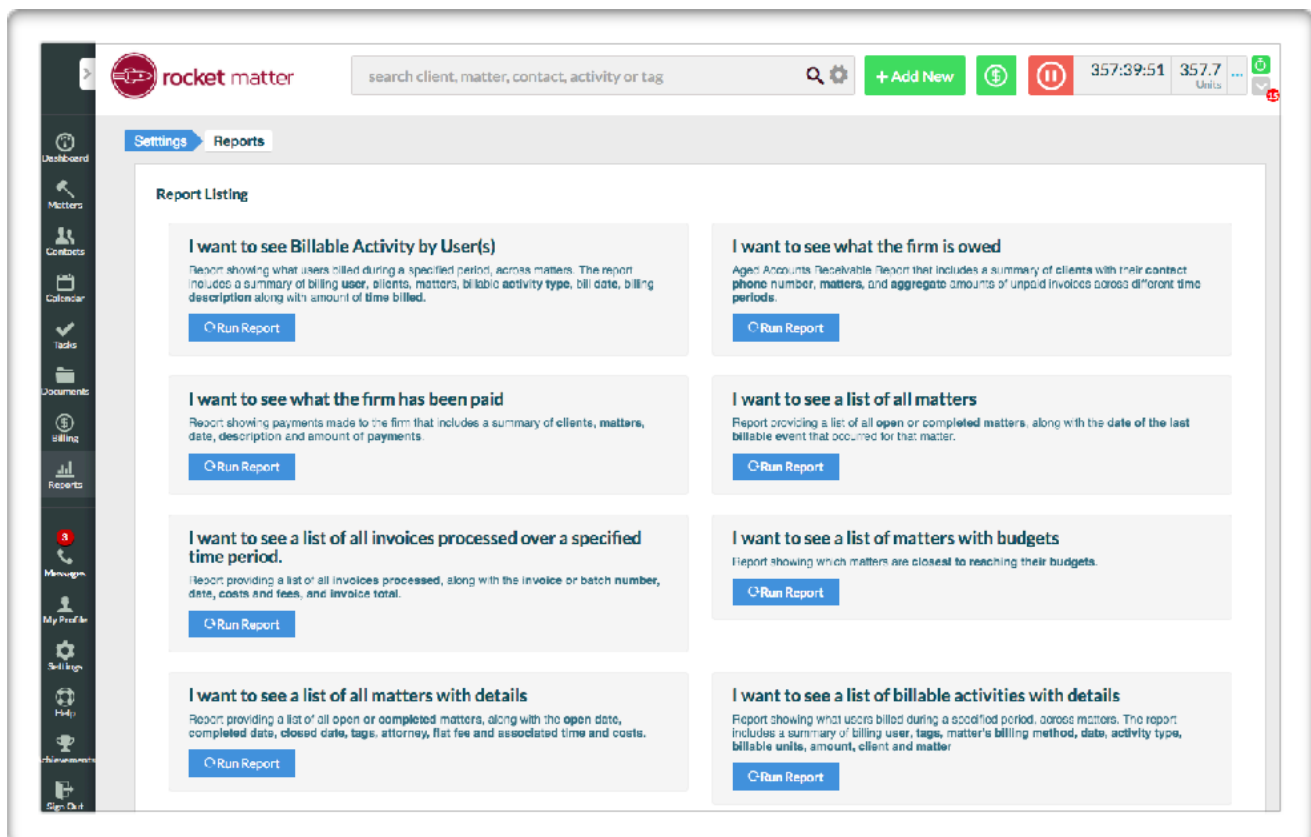
**What's more: Rocket Matter completely automates both payment plans and recurring billing.** You set up a fee, type in your client's credit card or ACH routing information, and you're done. With payment plans, the balance is paid off gradually over time while with recurring billing, your client is automatically charged. By automating these processes, you greatly increase the likelihood that your law firm will be paid in full.

See it in Action! 



# Productivity Reports

An essential key to profitability is diving deep into your financial numbers to determine what you're doing well and where you can improve. You can figure out who your top performers are and which employees aren't pulling their weight. You can also learn which matters are more profitable than others, which clients pay more quickly than others, and other critical items related to your billing.

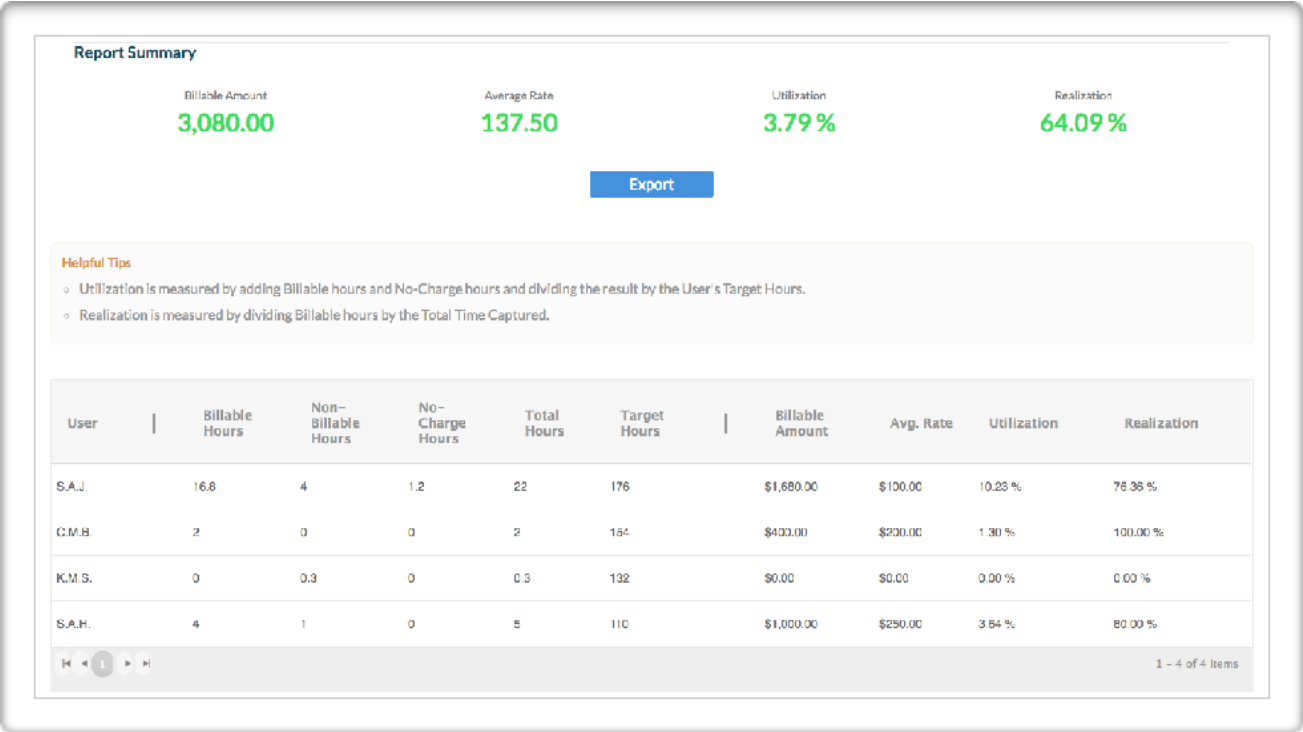


Rocket Matter's productivity reports make it simple for you to understand such metrics. For instance:



## Productivity per User

This feature allows you to quickly assess if associates and staff are meeting productivity goals. To use the Productivity per User report, you must first set target hours for each of your users. Then, when you run the report, you will get a breakdown of how much time that user is spending on hourly, non-billable, and no-charge hours. The report will also approximate the user's billing rate based on their time usage. Other metrics are considered as well.



## Productivity per Matter

This feature helps you understand which of your cases absorb the majority your time by showing you a breakdown of how much time a user bills for and doesn't bill for, and how many fees have been billed for or not billed for. An effective billing rate is also calculated for each user.

## A/R Reports

This report will give you the data you need to manage your delinquent accounts. Our detailed report includes client to matter breakdowns on exactly what is owed and how long the account has been delinquent. We also provide you with the demographic information you need in order to obtain collections.

See it in Action!



# Project Management

Rocket Project Management integrates seamlessly into Rocket Matter's case management platform and help attorneys take a methodical and automated approach to managing their matters. It 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.

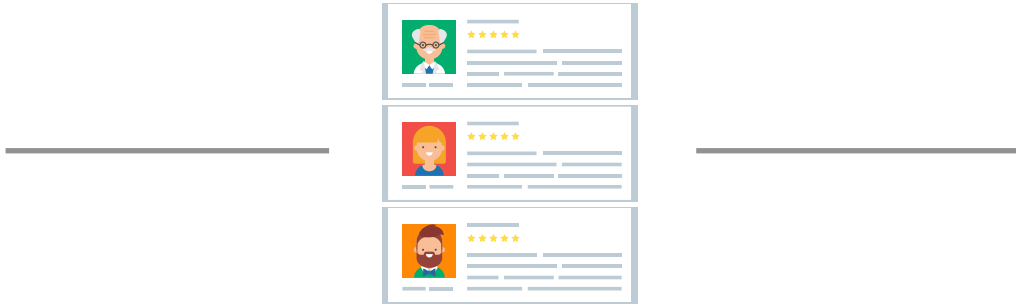
The screenshot displays the 'Workflow Statuses' section of the Rocket Matter interface. At the top, there are tabs for 'Settings', 'Workflow Statuses', 'Matter Types', and 'Workflow Transitions'. Below the 'Workflow Statuses' tab, there is a 'View Manual' button and a green plus icon. A light blue box contains an 'About Workflow Statuses' section with a lightbulb icon and explanatory text. Below this is a table listing various workflow statuses.

Status Name	Status Description	Edit	Delete
Auto - Client Receiving Treatment	Used to track when clients are in the treatment phase.	Edit	Delete
Auto - Demand	Status that indicates the case is in a demand status.	Edit	Delete
Auto - Litigation	Case has entered litigation.	Edit	Delete
Auto - Settlement	Case has reached a settlement.	Edit	Delete
File Closed	File Closed	Edit	Delete
New Case	New Case	Edit	Delete
New Case Intake	Status to be used for new cases being entered into the system.	Edit	Delete

When a matter is switched from one phase to another, all of this predefined data automatically appears in Rocket Matter. Along with the workflows, you'll have access to sophisticated reporting about the status of the matters going through phases.

See it in Action!





# **“How Rocket Matter Helped Me Boost Profits in My Law Firm!”**

## *Client Testimonials*

“The ability to keep track of deadlines, enter time, and track expenses all in one place has been invaluable to my firm's bottom line.” — [Antwon Emery](#), who practices civil litigation at Torres Law Group in West Palm Beach, Florida

“Rocket Matter's billing and time keeping features have increased my productivity and definitely increased my profits. Also, the email integration has increased my ability to communicate with and send out bills to my clients.” — [Robert Hoffman](#), who practices family law and criminal law in New York and Florida

“Rocket Matter has helped us track all of our billable time with the ability to run timers while working. We appreciate the ability to run reports to see where we can improve as well as where we need to refocus our efforts. We love the integrations they have including the ability to take credit card payments easily online. Thanks, Rocket Matter!” — [Christopher Warner](#), a legal assistant at Evergreen Law Office in Puyallup, Washington

“I love the simplicity of Rocket Matter's dashboard to determine my work in progress. That's the best way I know to predict future cashflow.” — [Jim Worthington](#), who practices estate planning and administration, general business law, succession planning, estate and trust litigation, and charitable planning for donors in Louisville, Kentucky

“I love Rocket Matter’s cloud-based calendar and billing software because it lets me access my information wherever I am. It's easy and simple to use.” — [Ron Kaniuk](#), who practices business and corporate law, civil litigation, bankruptcy, real estate, and wills and probate in Fort Lauderdale, Florida

“We have been using Rocket Matter since 2012—as a single attorney firm, it helps us manage over 380 open cases. Some features that help boost profits: The Bill-as-You-Work technology saves us time when it comes time to charge clients. Instead of working backwards, trying to remember what each staff member did for each client and when, all of that information is already recorded and ready to be billed. Productivity Reports give us a way to measure what types of cases are most profitable so that we can focus more resources on them. Payment processing and electronic invoicing have sped up the process of billing—quite a few of our clients now pay their bill the same day they get it. And Project Management helps us see a quick report on the kinds of matters we have open and their statuses. It helps to quantify our process and identify any bottlenecks we may have. Keeping the cases moving helps keep our revenues flowing.” — [Karen Brady](#), who practices Estate Planning, Business Planning, and Probate in Arvada, Colorado

“Rocket Matter has helped to boost our office's profits by streamlining our case management and organization which has enabled us to free up time and accept more clients.”—[Candace Little](#), a family lawyer at The Law Office of Nathaniel M. Smith, LLC in McDonough, Georgia

“I spend less time setting up new clients and matters in Rocket Matter than I did when using other programs. The trust accounting/billing process is easy to learn and very user-friendly. Also, as a solo practitioner, I don't want to spend a lot of time on administrative tasks as that takes time away from clients. With Rocket Matter, the clients receive easy-to-read account statements, which means less time on the phone explaining a client's bill to them. The Evergreen Retainer is another great feature. It helps clients monitor their trust account balance, which also means less time following up with clients whose balances fall below their individual threshold.” — [Lu Aloupas](#), who practices family law and criminal defense in Chesapeake, Virginia

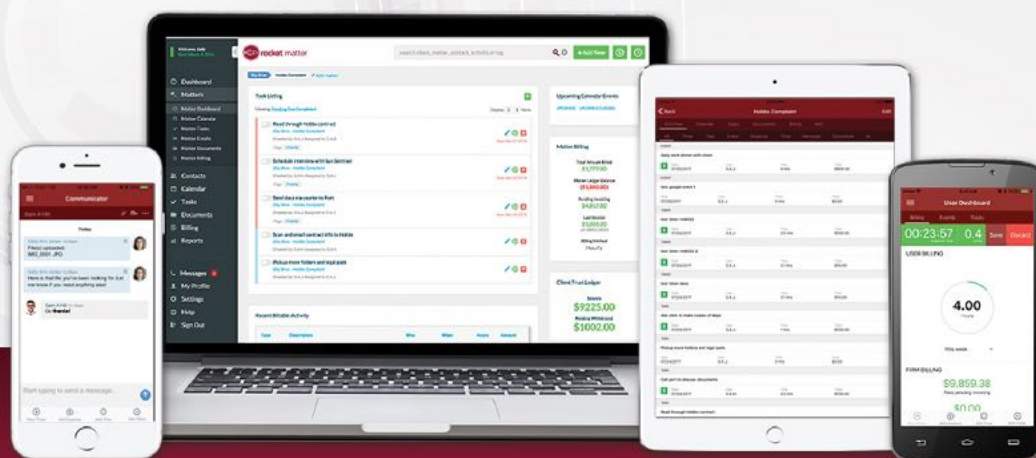
# About Rocket Matter

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.

## Rocket Matter helps boost your law firm's revenue by more than 20%.

Contact us today to start your free 7-day trial of the world's leading legal practice management software!



1-866-710-1845  
[rocketmatter.com/try-us](http://rocketmatter.com/try-us)