

# PCLaw<sup>®</sup> Case Study: Time & Expense Entry, and Calendaring & Contact Management

**Challenge:** To manage the day-to-day operation of a law practice efficiently, with the goal of maximizing revenue – and the bottom line.

**Solution:** PCLaw® client, matter, billing and accounting software from LexisNexis Canada Inc.

**Why:** Easy-to-use, comprehensive functionality means legal professionals can enhance their productivity by spending less time on administrative tasks and more time servicing clients.

## Improved productivity at your fingertips

Everyone is familiar with the saying “time is money,” but that truism is particularly applicable to legal professionals building and running a successful practice. For those practitioners, the bottom line is directly related to their level of productivity, and the more efficient they are, the better. Finding a way to quickly and effectively take control of the administrative side of their practice – from keeping track of billable hours to managing their calendar – is essential.

Enter PCLaw® client, matter, billing and accounting software from LexisNexis Canada Inc.

*“I was establishing my practice and knew I needed some sort of accounting software package,”* remembers Carrie Bertrand of West Grey Paralegal Services in Durham, Ontario. *“I’d spent several years working as a paralegal and law clerk at various firms in the area and had used PCLaw to do the bookkeeping at one of the offices.”*

*“I’d always found the accounting functionality in PCLaw to be intuitive and easy to use,”* continues Bertrand, whose practice focuses mainly on landlord and tenant, small claims, and Workplace Safety and Insurance Board (WSIB) matters. *“However, the broad range of other features included in PCLaw that help me save time and increase efficiencies make it an invaluable part of my business.”*

### Streamlined operations

Bertrand cites the **Time & Expense Entry** and **Calendaring & Contact Management** features of PCLaw as being particularly beneficial to her practice as they not only enhance her productivity, but also provide the opportunity for a 360°, at-a-glance view of many important facets of her business.

For instance, Bertrand relies on PCLaw for the day-to-day functioning of her practice and to ensure she’s generating as much revenue as possible by capturing all of her billable hours. Depending on the matter, Bertrand either uses the timesheets to keep track of her time or a fee sheet if she’s charging a flat fee. She also finds the Time Entry Advisor indispensable as it sends a reminder at the end of the day about that day’s unbilled tasks. Plus, it’s easy to input and recover expenses such as couriers, parking and other disbursements.

*“I really like being able to look at the different aspects of my practice quickly and easily. For instance, like most legal professionals, I’ve set myself goals for the number of billable hours I should have per day, per week, per month,”* Bertrand continues. *“With PCLaw, I can check my time summary throughout the day to see if I’m on track to meet my targets. It’s also easy for me to check my time entries, and update them if necessary or input items I forgot. That function alone optimizes the efficiency of my practice, and improves my bottom line.”*

According to Bertrand, her clients also benefit from the extensive practice management capabilities built into PCLaw. *“With this software, it’s easy to open a file, check on the status of a matter, conduct a conflict search or produce a trust receipt for a client. It cuts down on the administrative work I’m required to do for each client matter, which means I can focus my time and energy on resolving the issues that my clients are facing.”*

One of Bertrand’s favourite PCLaw features is the calendaring. *“I always have the calendar open. I use it to structure and organize my day, and to prioritize the tasks that I need to accomplish. I particularly like the way the different components of PCLaw link together to provide a full solution for my practice – I can turn appointments in my calendar into time entries, and the contact manager is so efficient, I only have to enter client information once and then I can access it for future matters. The PCLaw calendaring feature just makes my life easier.”*

Moving forward, Bertrand is planning to take advantage of the 24/7 Remote & Mobile Connectivity available through the PCLaw Mobility service. That feature provides secure, real-time access to key areas of PCLaw through a smartphone or mobile device and will enable Bertrand to capture billable time and expenses as they occur – even when she’s away from the office.

Ultimately, Bertrand sees PCLaw as an essential part of her practice. *“I believe PCLaw is well worth the investment and have already recommended it to several other practitioners in the area. I simply couldn’t imagine practising without it.”*

In addition to Time & Expense Entry and Calendaring & Contact Management, PCLaw includes a broad spectrum of tools and functionality to ensure your practice runs as smoothly, efficiently and productively as possible, including:

- Case & Matter Management
- Accounting & Productivity Reporting
- Billing & Accounting
- Trust Accounting
- Document Management
- 24/7 Remote & Mobile Connectivity

[Learn more at \[lexisnexis.ca/pclaw\]\(https://www.lexisnexis.ca/pclaw\)](https://www.lexisnexis.ca/pclaw)



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