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Next-Gen Features in Practice Management Software

By Warren Christopher Freiberg

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While some practice management products may disappear, the overall category itself is healthy since most law firms need this software to manage their business.

Virtually all practice management providers check many of the same boxes regarding features — billing, matter and document management, etc. It can seem like the only real difference is which user-interface you prefer (or possibly what you can afford).

But this isn't entirely accurate. Behind the scenes, a research and development arms race is underway as the most well-financed companies seek to differentiate their software from the competition. For this issue of *SmallLaw*, I spoke with Jack Newton, CEO and co-founder of Clio, about the next-gen features his development team recently added to Clio, and what he sees on the horizon.

Clio Views Platform Building as Key Along With Client Portals and Mobile Apps

Cloud pioneer Clio launched in 2008 and is currently used in more than 15,000 law firms — primarily small law firms and solos. Clio spends heavily on R&D to stay ahead of the curve. It was one of the first practice management products with an iOS app.

"At Clio, [we] recognized back in 2012 that the shift to mobile is one of the most important platform shifts since the advent of the cloud, and started work on making sure our app's user experience scaled well all the way from smartphones to tablets to desktops in a way that caters to the specific use



Clio CEO Jack Newton

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cases customers are looking for in these scenarios," Newton told me.

Secure client portals are among one of the most important next-gen features that Clio offers. "In a post-Snowden world, the level of security provided by email is not adequate for sensitive client communications," Newton says. "Client portals can provide end-to-end encryption and a much better experience for clients."

The biggest difference between Clio and its competitors is its focus on integrations with third-party apps.

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The Practice Management Flywheel

Every practice management software company has its own philosophy about which next-gen features to build. However, features that become viewed as essential will quickly make their way into the best products — and it'll quickly become clear which products are lagging. In the meantime, the marketplace is such that you should be able to find a product adding next-gen features that will benefit your law firm.



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