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Timematters, Outside Consultants and Your Own Time

Has anyone "successfully" set up TimeMatters without the assistance of an outside consultant? If so, how long did it take to get fully up and running?

Michael D. Day, Meriden, Connecticut

My friend did it by himself. It took him about 2.5 months to master it, using only the manual, trial and error, and several of the free service calls to Lexis, but now he truly is a master. He is teaching me now for free.

Of course, my friend is exceptionally bright and tenacious.

Gene Lee

While we did it at our firm, I had a consultant come out later to help me understand some of the powers of the program. I would call consultant out to install and show you the bells and whistles. Penny wise, pound foolish was I.

Robert W. "Robby" Hughes, Jr., Stone Mountain, Georgia

It would be interesting to get an estimate from him as to the time he invested and then calculate what a consultant would have cost for the time that he could have been billing.

Deb Matthews, Alexandria, Virginia

Not to mention the 2.5 months, he could have already been up and running with it.

Robert B. Walker, Herndon, Virginia

I set it up by myself. I spent about a day of time (spread out over two days). I probably am not using all of the features, but it works for my needs.

Jonathan G. Stein, Elk Grove, California

I have been running TimeMatters for about 1 year and know that I am not using it to full capacity although it is better than what I had been doing before. I am now planning on spending some $ with an outside consultant so that I can better use its features and possibly customize it more for my

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Jim Moldenhauer, Eau Claire, Wisconsin

Frankly, it probably wasn't the best use of his time. I don't think learning the program ate into his billable time. Rather, I think he sacrificed time with his son and wife on the weekends and after work on weeknights.

His argument was that he could not have learned the program to the degree he has learned it had he used consultants.

As for me, I'm the beneficiary of his largesse so I'm not complaining.

Gene Lee

When I first started with TimeMatters (around 1993 - only a DOS version), it took me about 15 minutes to install and start entering data -- and probably 10 minutes of that was creating backup diskettes and swapping them in and out of the floppy drive.

If you are setting it up in a one-user environment, I think that (if you already have basic computer skills), its fairly easy, and you can do basic data entry on the fly right away. The current version comes with a very good print manual, various HelpCam lessons (lessons on CD), and reasonable on-line and in-program help files.

Many people swear by consultants. If you have the budget, that may be the way for you to go.

The time consuming portion of setup will be customizing the program to work to fit your practice. There is a sample database included; I recommend that, before you start putting in your own data, you navigate the sample database and find out some of the possibilities.

But basic stuff? Entering file records, contacts, events, tasks, phone calls, etc, and linking them together? Pretty fast because, IMO, the interface is pretty intuitive.

There are also two very useful listserves available with helpful people. One is run by the AICs (Authorized Independent Consultants) and can be reached via the website; the other is the original list, maintained by Bob Fleming. Can't think of the address offhand (someone here probably knows it) but I can look it up if you'd like. I'm one of the first 10 members of that list, so know how valuable its been over the years.

Barry L. Lippitt, Southfield, Michigan

There are a couple of angles here - one is whether you're talking about the Professional or the Enterprise edition. A Professional install goes pretty quickly. An Enterprise install also includes monkeying around with a database on a server, and would be tougher for a non-tech person.

I got 5.0 Professional up & running in a couple of hours. Getting 5.0 Enterprise running on a Linux box with a Postgres server took probably 1/2 day. I don't think my installation is running as well as it would have with a consultant but I also feel like I understand what's happening in a way that I wouldn't have if someone just showed up, made it work, and disappeared.

A self-install is not impossible but also probably not the best use of your time (if you are busy enough that those hours would not be idly wasted) and probably not the best way to really get the maximum value out of the program.

The most important point to make, I think, is that no matter how you approach the installation, you're going to have a learning period where you learn how to work with the program, and how your practice and the program can be tweaked to work well together, and this learning process is not necessarily fast or easy.

Greg Broiles, San Jose, California

I did, but the consultant time would have been worth it. I now pay for one to drive 1.5 hours, do a full day's training with my staff, and drive 1.5 hours back once per year.

I use my afternoon high schooler for basic data entry and am training her to create the merge templates. But, she is exceptionally bright -- and my regular staff just can't get the hang of creating the mystical, magical, merge templates.... (dripping sarcasm). They use them just fine, though.

Mary L. C. Daniel, Winchester, Virginia

My question is..... many people swear by TimeMatters, Amicus, or PCLaw, and others swear they are very happy with just using Outlook or ACT andQuickbooks Pro. For a new solo launching with a bare bones budget, no clients yet (just getting pre-launch lined up), and a need to spend as much time marketing as possible - why in the heck would I want to waste my time and spend very precious dollars (or credit) on such software. If I bring on so much business that I hire a secretary a year or two down the road, I can always pay someone to help me switch then - and I really don't think I will have to switch............

Albert Unger

I think there are a few differences. I am a TimeMatters user, although I used another program at a different firm.   Outlook and ACT are more like contact managers with scheduling capability. Time Matters does so much more. Off the top of my head, I do the following with TM:
1- Track every case in my office
2- Manage all my contacts
3- Schedule everything
4- Set up new cases and with about 2 clicks, schedule every statute, every deadline and every other important date.

5- TM lets me write letters by importing data into WP.
6- TM bills my time and generates invoices.
7- Tm lets me archive my old cases so I still have them around
8- When you get substituted out of a case, as I just was, I can quickly generate my lien so that I get paid
9- TM can relate things to each other
10- TM keeps track of the adjusters I have cases with
11- TM will let me check for conflicts quickly
12- TM lets me keep notes on files.
13- Here is a big one: Its cheaper to get malpractice insurance if you are using case management software.

Call around and see how long it takes for the software to pay for itself.

Jonathan G. Stein, Elk Grove, California

Microsoft Office Outlook 2003 does many of these things. In fact, there are many aspects of the program that are customizable. The email is wonderful in Outlook. However, I hear that the TM email can be cumbersome.

I purchased TM about 1 month ago, and I am giving some thought to returning it. If Outlook is used to its fullest, it can really do many of the things TM can do. I am sure there are some things TM can do better. However, Outlook is much more user-friendly. You can set it up to track cases, to take notes, journal entries, phone calls, etc.

What do others think about TM vs. Outlook?

Michael D. Day, Meriden, Connecticut

I agree w/Jonathon's list although he is much of a power user than I am. However, it may be even more important to use something like TM when you do not have a secretary to help you keep track of things. I do not, obviously, know your situation but seriously recommend that you look at this issue long and hard.   Yes, it is an initial capital investment, but the ROI can be significant if get it set up correctly and use it.

While you are marketing and then doing whatever work you bring in, the calendar must be kept current and accurate; documents have to get drafted and transmitted, phone calls made, etc.   And then you have to keep track of all that.   One of the advantages of TM (I don't know for sure about Amicus and PC Law) is that you can sync the data between desktop, laptop and Palm so you have contacts, calendar, case notes, etc. wherever you are.

Also, getting organized from the very beginning will pay dividends later, when you don't have to go back and redo systems, etc.

You would also be wise to contact your Bar's version of Reid Trautz early on.

Robert B. Walker, Herndon, Virginia

This really is one of those penny wise/pound foolish issues. Moreover, that fact is hard to accept if you are already up and running successfully and haven't made the move to case management software. For a true solo, just the document generation features of case management software (I only have experience with TimeMatters) pays for the software and training very quickly. Especially if you don't have a secretary or won't have one for a few years.

Even without clients, your marketing efforts will require you to keep track of your contacts and to generate correspondence. No matter how much marketing you do, without any clients you will have time to build letter templates for sending all types of letters to your prospective clients. When you're properly set up, with a few keystrokes you can spit out a letter thanking "Mr./Ms." "insert name here" for taking time to meet you for "breakfast/lunch/coffee" to discuss their "real estate/healthcare/banking/whatever" business. And every letter looks personalized and professional, because TimeMatters pulls the pertinent information from the contact information you have already entered, and inserts it into your Word or WordPerfect document. And if you later get an assistant or secretary, training them to do the data input saves you even more time. And they will quickly see that generating documents in this fashion is always faster than creating them from scratch or even using "cut and paste" to modify existing documents. This is just one simple example. Others have already given you more extensive lists of the things case management software can help you with.

I have been using TimeMatters for about five years. Over that time I have spent less than $1800 on software and consultant fees. Some people spend more, some spend less. For me it has been a real bargain. In retrospect, I wish I would've started using it the day I went solo. Even though I had more time than money back then I see now that it would have been a worthwhile expense.

Gil Shuga, Mesa, Arizona

I see this thought a lot from new as well as practicing attorneys. They often don't see the value in the legal specific packages. Instead they try and use an "off the shelf" product because it's less expensive. Then they spend a lot of time, energy and money literally "recreating the wheel" rather than focusing on what they do best.

Products like Outlook are not designed to work from a "file" or "matter" focused perspective i.e. working from a matter rather than a contact. What the legal packages allow you to do is to gather in one place all the information regarding a specific file or matter. In my own practice, TimeMatters is where we keep everything regarding the file including contacts and related parties, phone records, notes, email, documents, research information, etc. I enter contacts one time and can use them over and over again because Time Matters is a relational database allowing a one to many relationship between records (meaning that I can relate different pieces of information together without having to enter new records each time). For example, I do a lot of real estate, I have Realtors,

lenders, title companies and attorneys as Contacts. When I open a new file I don't have to re-enter these contacts if they are already in the system I simply relate them to the matter, re-using the information over and over again. Additionally, I don't have multiple Contact records like if I tracked everything by contact and had to enter the contact for each new matter.

Furthermore, you can use the information from the matter management software to help market your practice. Time Matters allows multiple classification codes which are fully searchable and can be used to differentiate and identify practice areas, client types, etc. here's an excerpt from my contribution to the ABA's new book "How to Capture and Keep Clients: Marketing Strategies for Lawyers"

"One of the benefits of using a legal specific matter management package such as Time Matters, Practice Master, Amicus or Abacus is the ability to identify matters by a practice area. You can create lists of matters and then identify the associated clients for practice areas in which you want to send targeted information and marketing materials. Rather than just sending out general information newsletters, you can target clients for newsletters and information that is focused on their specific needs. For your corporate clients, you can send information regarding changes to your state's business corporation act or changes in tax treatment. Your clients that rent property can be targeted for information specific to landlord-tenant matters. If you are using a legal specific time and billing package you can also create detailed reports on the practice area or areas where the majority of your income is coming from which may surprise you. Using this information, you can further tailor your marketing efforts to those areas that are your most profitable. "

For the full chapter and other valuable information, you'll have to buy the book .

Even if you don't want to spend the money for TimeMatters, at a minimum you need to have a Time and Billing system in place. As Ross pointed out in a an earlier post, Tabs3 includes Practice Master which while as not fully featured as Time Matters, is a good program. You get your Time and Billing and practice management thrown in as a bonus.

Nerino J. Petro, Jr., Loves Park, Illinois

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