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# Review of LexisNexis Firm Manager

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October 15, 2014



www.technolawyer.com

*Solos and small law firms have a plethora of options for cloud practice management applications these days, including LexisNexis Firm Manager. In this issue of SmallLaw, New Jersey lawyer and former IBMer Edward Zohn reviews Firm Manager, which LexisNexis spent a year rebuilding from the ground up. Ed evaluates the core features, the user experience on an iPad and iPhone, integrations, pricing, and more.*

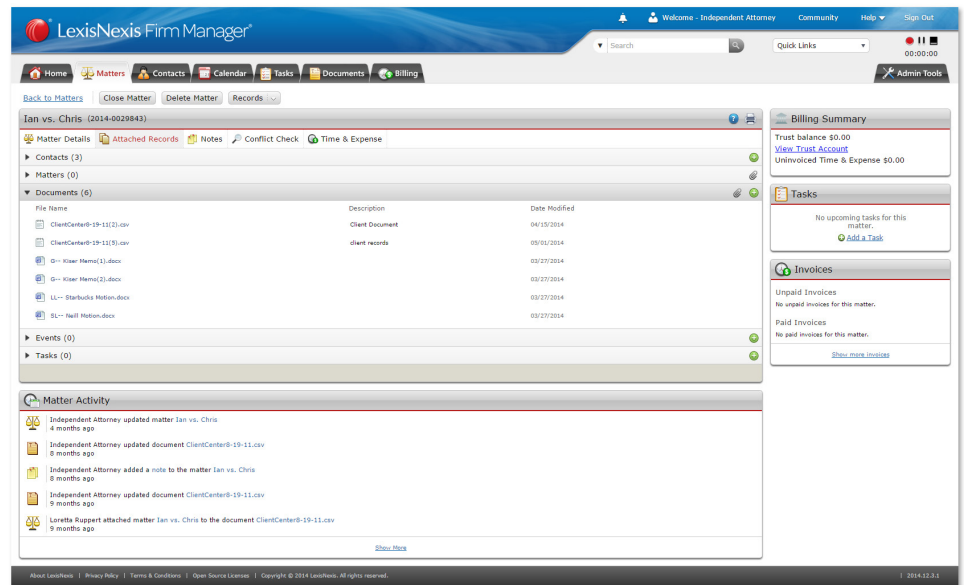
Small law firms standardized on word processing software a long time ago, but many still seek the holy grail of practice management software. Fast and ubiquitous Internet access have increased our choices by paving the way for cloud applications. I recently spent some quality time with [LexisNexis Firm Manager](#) for purposes of this review.

Firm Manager originally launched in 2011. However, it required Microsoft's Silverlight just as the plug-in era was drawing to a close. LexisNexis completely redesigned Firm Manager last year and relaunched it earlier this year. It now runs in all web browsers, including Safari on iOS.

Firm Manager has all of the features you would expect, but it's thankfully less complex and expensive than some of its competitors. I didn't need to search for the missing manual.

### The Eight Pillars of Your Practice

Firm Manager's home page contains eight navigation tabs on the top, corresponding to Firm



Manager's main functions. The "Home" enables you to view your most important events, current and overdue tasks, and recent activity.

The "Matters," "Contacts," and "Tasks" tabs contain lists that drill down for increasing levels of detail. Clicking on any contact's email address starts a new email with your local email client (if you have one). Unlike some practice management systems, you cannot manage email within Firm Manager. Firm Manager also includes a conflict-checking function via a specialized search box.

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with Firm Manager in less  
than an hour.**

The "Calendar" tab looks very much like Outlook though ironically it currently only synchronizes with Google Calendar via Google Sync.

I tested Firm Manager's calendar synchronization using my personal calendar (I use hosted Exchange for work). The synchronization works well, although lawyers should use Google Apps for Work rather than the consumer version of Google Calendar.

The "Documents" tab enables you to upload files, associate them with clients and matters, and run full-text searches. Thanks to Firm Manager's integration with client portal [WatchDox](#), you can securely share files with clients (WatchDox won't cost you anything). Editing documents requires downloading and re-uploading.

### Other Notable Features

Every Firm Manager screen shows three "anchored" functions on the top. The "Quick Links" menu in the upper right-hand section enables quick access to Firm Manager's most common data-entry tasks. To its left is a Global Search box. To its right is a timer so you can track your billing events with one click.

Firm Manager has easy-to-use timekeeping, billing, and trust accounting functions. You can start and stop the timer from any Firm Manager screen. Firm Manager generates basic invoices from time entries, but you cannot yet link the receivables, payments, or anything else with your accounting system. The trust accounting function can help you keep track of your clients' funds, but again you must manually re-enter data into your accounting system.

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If you import contacts and matters from other software, you will have plenty of data to work with early in the process. If not, prepare for a period of data entry.

#### **Documentation**

Firm Manager is one of the few software products I've reviewed that didn't elicit a rant about substandard documentation, lack of user guides, etc.

Contextual help exists, but I didn't need it much given Firm Manager's intuitive user experience. That said, I'd like to see a "Getting Started" manual in PDF format. The Firm Manager website offers a knowledgebase, online chat (during business hours), and community message board. My one call to technical support was handled quickly and effectively.

To become familiar with Firm Manager, I simply started entering data until I hit a dead end or had a

question for which an answer was not immediately obvious. I became productive with Firm Manager in less than an hour.

#### **Integration With Other Products**

Integration with other products is Firm Manager's biggest deficiency. In fairness, this criticism applies to all cloud software, including kingpin Salesforce which just this week announced a long overdue integration with Microsoft Office.

Firm Manager enables you to import basic client and matter information. LexisNexis will help you without charge. The transfer requires the Chrome web browser and the export of your data to an Excel spreadsheet or to a CSV text file. I hope that LexisNexis adds more functionality to the import tool as the current option is limited.

Firm Manager does not export data to or synchronize with anything but Google Calendar as discussed above. Even though it would increase complexity, I hope that LexisNexis develops links to other popular software products in the near future. For me at least, creating a bidirectional link with QuickBooks would substantially increase Firm Manager's utility.

#### **Using Firm Manager on the Go**

Because Firm Manager is a web app, you will want to use it with your mobile devices. LexisNexis promotes this — most of the photos you see on the Firm Manager website are men and women with smartphones and tablets. Currently, there's no native Android or iOS app. Instead, Firm Manager provides a moderately responsive website for smaller screens.

When logging into Firm Manager on my iPad 3 (the first retina model released in 2012), I was presented with a view that looked no different from my desktop computer with a

1920 x 1080 23-inch screen. The iPad's pixel dimensions exceed those of my 23-inch screen so this makes sense. However, responsive web design has moved away from using pixels to determine what design to show users. Suffice it to say that while Firm Manager works fine on an iPad I'd like to see an iPad-specific interface.

When logging into Firm Manager on my (now miniscule) iPhone 4S, Firm Manager was clearly aware that I was on a device with a much lower resolution. Sections of the web pages were stacked rather than placed side-to-side, requiring only vertical scrolling. I still had to pinch and zoom a bit.

The verdict on Firm Manager's mobility is that it works perfectly fine on a high-resolution tablet and is quite usable on a smartphone as long as you have good eyesight or reading glasses. Since I carry my iPad everywhere, using Firm Manager on my iPhone would be a rare occurrence. Android and iOS apps would be welcome as this seems to be the trend for cloud applications.

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#### **Price and Terms of Service**

LexisNexis's pricing model for Firm Manager avoids the inflexibility of many legacy software products. Firm Manager does not require a contract. The website prominently states that you can cancel anytime, and that no hidden fees exist. Firm Manager costs \$44.99 per month for the first user, and \$29.99 per month for each additional user. This is refreshingly simple and fair.

If you sign up for a year, you can get a lower price.

You can try Firm Manager free for 30 days without entering a credit card. This is exactly what I did — and I didn't request or receive any special setup as is customary when reviewing software for SmallLaw. I navigated to the "Pricing" page, clicked on the big red "TRY IT FREE" button, and signed up. In less than two minutes, I began entering data.

#### TechnoScore

Limitations aside, I really like Firm Manager, mostly because it doesn't try to be something it's not. Firm Manager provides many — but not all — of the functions a small-firm attorney needs via a coherent, easily learned interface.

I hope Firm Manager adds some bidirectional links to other popular products, but realize this may increase Firm Manager's complexity and learning curve.

At the top of my list I'd place Exchange integration, especially given the adoption of Microsoft's Office 365 by small law firms.

Firm Manager does not look like it was designed by three people on laptops in a software incubator who have never seen the inside of a law firm. Instead, Firm Manager is an attractive, reasonably priced, well-designed web application in which lawyers clearly had some input. All in all, it's a solid product from a well-known source that deserves a TechnoScore of "A."

#### LexisNexis' Response

We invited LexisNexis to respond to this review. LexisNexis Firm Manager Vice President and Product Champion Susan Harman responds as follows:

*"Firm Manager allows in-app document editing that lets attorneys open, edit and save documents from within the application. Watchdox also allows for direct*

*editing without downloading and re-uploading. In 2015, Firm Manager will launch a client portal that will give an additional option for users to securely share documents with their clients.*

*"While our Get Started manuals are currently available onscreen in HTML, offering them in a downloadable, printable PDF format is a great suggestion for those who want the option, and it's something we'll make available soon."*



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