LegalTech PUBLISHING

IN PARTNERSHIP WITH ABOVE THE LAW

CRM, BUSINESS DEVELOPMENT, VIRTUAL RECEPTIONIST, CHAT & TEXT MESSAGING

BUYER'S GUIDE: 2022 EDITION

CRM, Business Development, Virtual Receptionist, Chat & Text Messaging 2022 Buyer's Guide

Table of Contents

Introduction 3

Law Ruler 4
Lawmatics 8
Moxo 12
MyCase 15

Solution by Firm-Size		
Small Firms: 1-25 Attorneys	Midsize Firms: 26-100 Attorneys	Large Firms: 101+ Attorneys
Law Ruler	Law Ruler	
lawmatics	lawmatics	
MOXO	MOXO	MOXO
mycase		

About

The CRM, Business Development, Virtual Receptionist, Chat & Text Messaging Buyer's Guide: 2022 Edition is a publication of the Legal Tech Publishing division of the Legal Tech Media Group (LTMG) **legaltechmg.com**.

Legal Tech Publishing is highly recognized for its publications, educational webinars, case studies, and whitepapers.

Subscribe to receive updates and free resources:

info@legaltechpublishing.com

LegalTechPublishing.com

The Above the Law / LegalTech Publishing Buyer's Guides are supported by vendor sponsorships.

Welcome to Legal Tech Publishing's 2022 CRM, Business Development, Virtual Receptionist, Chat & Text Messaging Buyer's Guide

By: Cathy Kenton and Brian Dalton

Cathy Kenton, CEO,
Legal Tech Media Group/Legal Tech Publishing

CRM has become the lifeblood of modern law firms. It is the firm's virtual front door helping successful legal professionals communicate with prospective clients, automating the intake and engagement process, and connecting with other systems in the firm. Today's clients expect and deserve timely responses to inquiries and legal professionals that use technology to deliver outstanding representation.

In this Buyer's Guide, we explore technologies that assist lawyers and law firms in successfully building and growing their practices.

Use this guide to explore the latest in this critically important legal tech category.

To your success,

Cathy Kenton,
CEO, Legal Tech Media Group/
Legal Tech Publishing and

Brian Dalton,
SVP, Breaking Media

Brian Dalton, SVP, Breaking Media

Law Ruler

Law Ruler Makes Law Firms First Responders When Opportunity Calls from Legal Customers

> “Law Ruler gives firms an advantage by automating personalized client communications using a smart softphone dialer and real-time texting (SMS, MMS).”

Company Name Brand
Law Ruler Software, LLC

Product Name Brand(s)
Law Ruler

Latest Developments and Updates

- A modern, new user interface (UI) expands available space with bold colors, sharp distinctions, and familiar shortcuts to user actions.
- Stay efficient and productive with cross-platform mobile apps for Apple iOS and Google Android for mobile phones and tablets.
- Search bar added to the activity log, and sender phone numbers appear in case SMS tabs.
- Document merge codes now include a URL to connect to external content.

Increase New Client Business
Most legal clients go with the first law firm that responds to their initial inquiry. Be a first responder with Law Ruler, a cloud-based legal customer relationship management (CRM) and law practice management (LPM) platform.

Initially developed for client intake and legal marketing automation for plaintiff's firms, the modular, all-in-one platform is used by various legal practices. If your firm manages incoming referrals and generates leads from TV, billboards, or digital media, Law Ruler aims to drive better results and convert more leads to clients.

The Law Ruler Advantage
Law Ruler gives firms an advantage by automating personalized client communications using a smart softphone dialer and real-time texting (SMS, MMS). The company's softphone (powered by Twilio) uses an automatic dialer to make and receive calls with one click and prioritize callbacks to leads and prospective clients.

When a prospect calls a phone number assigned to a marketing campaign, staff can answer the call using Law Ruler's built-in softphone and complete a custom intake form based on the campaign that appears on-screen. *See Figure 1*.

Custom workflow stages appear across the top of an intake form. After completing

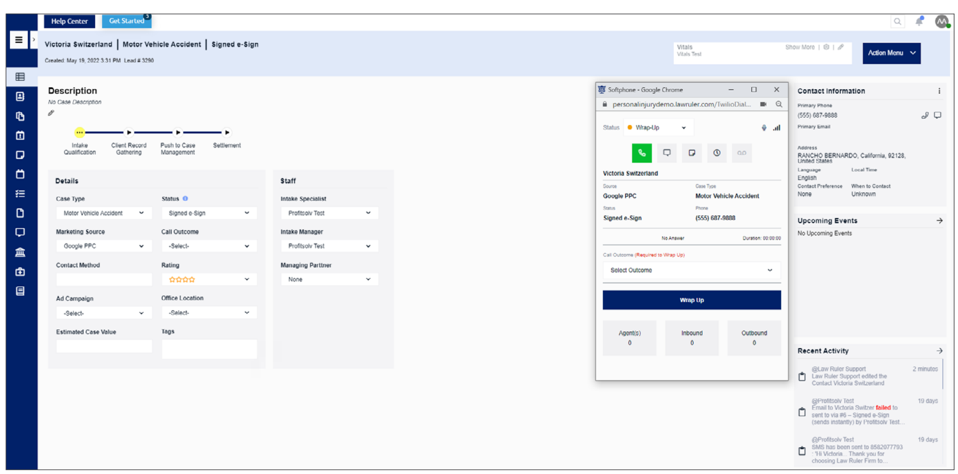

Figure 1: Law Ruler's custom intake qualification form opens when staff answers an incoming call to a number associated with a marketing campaign.

> **“Law Ruler supports fully customizable, mobile-ready, web-based intake questionnaires or forms. Brand documents with firm letterhead and post them on the web or send them to clients via email or text.”**

tasks, the lead status changes, and the workflow automatically updates.

When intake staff handles a call from a lead, they must select a custom outcome when the call is completed, such as appointment made, busy, call back later, do not call—opt-out, and hang up. A manager can see how all calls ended, run call outcome reports, and assign tasks as necessary to convert the lead to a client.

Law Ruler can automatically send email and **text messages** to clients and internal teams based on a lead's predefined status and related tasks or events completed, such as responding to an incoming call, attending an office visit, or returning an electronically signed retainer. Law Ruler includes electronic signature (e-sign) functionality powered by HelloSign. You can send documents, such as retainers, to a lead via email or text using automation or manually. The system tracks the outgoing records and automatically adds them to Law Ruler upon receipt or follows up with recipients when they do not return signed documents in a timely manner.

Firms receive Law Ruler toll-free or local numbers for phone and text to automate tasks and workflows. Alternatively, the software provider can assign different intake staff and attorney numbers. You can see and respond to one client's messages in a case view or respond to any client from a perspective of all text messages to and from the law firm.

Law Ruler's texting features facilitate communication after a client signs a retainer. Text clients to remind them to schedule appointments or complete a treatment plan. Staff can also pick up the company's built-in softphone to call clients and return calls immediately.

Intake process

Law Ruler's **automated legal intake process** can communicate with any marketing source that generates leads, such as Facebook or Scorpion. The company's open application programming interface (API) can ingest leads from any marketing source and transfer information and documents on converted leads (new clients) to LPM software, including Clio, Filevine, Rocket Matter, and Tabs3's CosmoLex and PracticeMaster.

Law Ruler supports fully customizable, mobile-ready, web-based intake questionnaires or forms. Brand documents with firm letterhead and post them on the web or send them to clients via email or text. Forms can capture numerous data points for any database field and use scripts for any practice area to create and manage intake or update client information. Law Ruler's intake forms use contextual logic to show or hide fields based on case types and responses to questions. You can design staff instructions and guidelines to implement and maintain a consistent intake process using forms.

A firm can use workflow automation to reject or approve leads based on answers during intake, send custom retainers based on case type and question responses, convert leads to clients when they sign a retainer, and send a welcome letter. Law Ruler includes several workflow templates based on case types that you can customize to your firm's practice areas, tasks, and milestones.

A firm must create its intake forms and letters or import existing documents into Law Ruler for editing. Like intake forms, Law Ruler can insert field codes into documents and use mail-merge functions to create custom content tailored to a client's requirements.

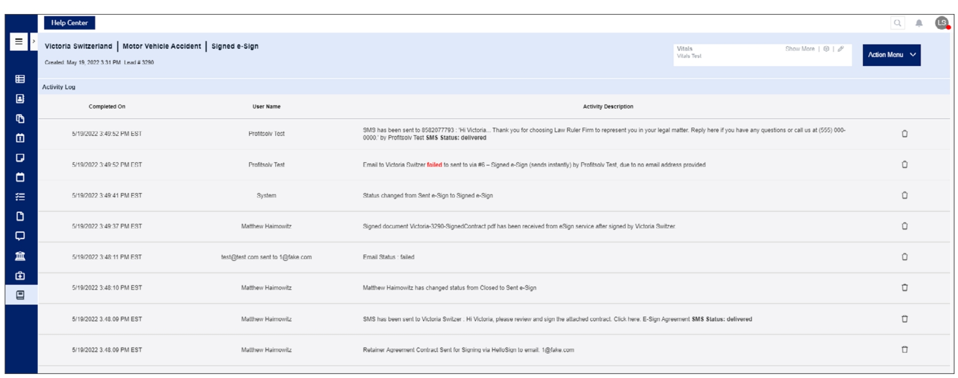

Figure 2: Law Ruler's LPM features compare favorably to other LPM software and include an audit log—an entire running case history of all work performed for a client.

> **“** Law Ruler’s reports can help identify a firm’s best marketing strategy and most or least profitable practice area. Law Ruler tracks the marketing budget to determine the number of incoming leads and costs per lead and compares estimated case values with revenue.”

From Lead to Client
When a lead converts to a client by signing a retainer, Law Ruler can transfer the client information to a third-party LPM system. If the firm does not have LPM software, it can use Law Ruler’s case management software to receive new clients at no extra cost. Law Ruler’s LPM supports a full-featured document management system (DMS) that automatically stores signed retainers and photos received via text/SMS in case files.

Law Ruler’s case management features compare favorably to other LPM providers. The software has tabbed access to features, including intake data, phone records, notes, documents, tasks, emails, expense records, and key dates (e.g., statutes of limitations, appointment dates). *See Figure 2 on the previous page*.

Law Ruler’s LPM can integrate with any email system. Emails are composed in Law Ruler, and any replies are stored by the case and are accessible from the email tab.

Reporting
Law Ruler’s in-depth reporting includes dashboards for lead tracking, marketing costs, and insight into firm activity, budget, and productivity. Reports include open leads, total leads (by date), pending e-signatures, new signups, leads by marketing source, retainers by case type, appointment trackers, and referrals. *See Figure 3*.

You can drill down into control data from dashboard reports and make the information actionable. For example, review leads that did not return signed retainers and assign a follow-up task to staff.

Law Ruler’s reports can help identify a firm’s best marketing strategy and most or least profitable practice area. Law Ruler tracks the marketing budget to determine the number of incoming leads and costs per lead and compares estimated case values with revenue.

Custom reports in Law Ruler allow you to report on any database field. After selecting fields, you can filter the information by date range, tags, case type, firm, intake specialist, source, status, and more.

Integrations and Technology Platform
In addition to connecting to lead sources and LPM software, Law Ruler connects with apps from more than 1,500 legal software providers, including call centers, answering services, marketing vendors, and case management vendors. Law Ruler has integrations with LawPay and QuickBooks Online and built-in connectors to TimeSolv, LawPay, HelloSign, Twilio, Zapier, ApexChat, and Microsoft 365.

Law Ruler runs on Microsoft Azure, allowing you to collaborate, comment, edit, and share any Microsoft 365 document in the cloud. You can draft intake forms, retainers, email marketing campaigns, and other documents within the Microsoft 365 user interface, and they automatically save to Law Ruler’s cloud-based DMS. With Microsoft 365, Law Ruler can offer powerful features such as co-authoring and version control. On Azure, Law Ruler can host and backup

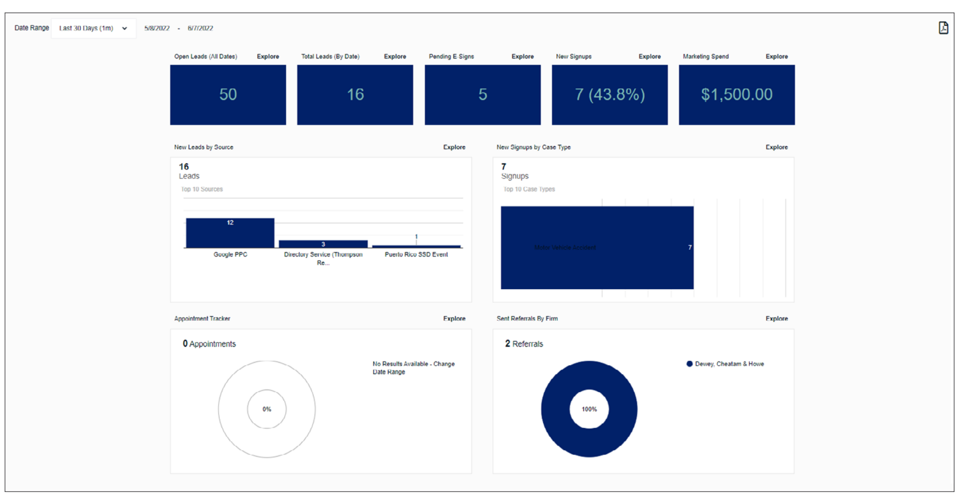

Figure 3: Law Ruler dashboards show top-level data analysis within a selected date range; drill down into charts to find discrete, actionable data.

data in global regions to satisfy regional privacy requirements.

Pricing
Law Ruler starts at $169 per month (billed annually) for three users and 10,000 contacts, with a one-time setup fee of $399. Law Ruler also offers DFY (Done for You) Onboarding based on their onboarding menu where costs range from $1,500 to $3,000 and include setting up the intake process, e-signatures, client portals, and staff training. For a lower startup cost, firms can skip the onboarding process.

Law Ruler has preferred vendor pricing relationships if you use TimeSolv, Rocket Matter, or Tabs3's CosmoLex and Practice Master. Connectors to LPM and third-party software are free, but some connectors do have an extra cost, such as Law Ruler's connector for Needles on-premises server.

Who is Law Ruler?
Based in Fort Lauderdale, Florida, Law Ruler started with the need to manage numerous plaintiffs over the years, from intake to settlement, on the Deepwater Horizon Oil Spill. Known mainly for its client intake and marketing CRM tools, Law Ruler recently added all the features of a practice management system, including matter and document management and time and billing software. The company offers its all-in-one, modular platform in the US and Canada.

Why Buy Law Ruler?
- Built-in softphone and texting features make it easy to communicate with leads, prospects, and clients.
- Marketing and intake tools and workflows **automatically track leads** from prospects to clients.
- Detailed dashboard analytics and custom reporting show return on investment on marketing campaigns and performance numbers of intake staff.
- Law Ruler integrates with more than 1,500 legal software providers and numerous lead generation and marketing partners.

Try Law Ruler Today!
See how your law firm can track leads, grow prospects, and gain clients with Law Ruler. **Schedule a demonstration today!**

Enrich Workflow Processes and Manage Your Client Relationships from Beginning to End with Automation

> "The custom forms in Lawmatics are highly configurable so that a firm can gather information based on the needs of each client. Fields are highly customizable and can be conditional."

Company Name Brand
Lawmatics

Product Name Brand
Lawmatics

Latest Developments and Updates

- New time and billing and conflict checking modules; new client communication portal.
- $10M in Series A funding, led by Ankona Capital along with Eniac Ventures, Revel Ventures, Interplay Ventures, The Legal Tech Fund, Bridge Investments, and Forefront Venture Partners.
- New payment plans and invoice automation.
- Added features in custom-built documents, including reCAPTCHA for embedded forms.
- Zapier trigger for appointment creation.

Relationships are Vital to Success
Client relationships are the lifeblood of any law firm. It is crucial to control and log every aspect of a lead's lifecycle from the initial call or email through every matter handled as a client, including each subsequent interaction. Lawmatics provides a thorough method of managing all client contacts. This is made possible through powerful automation, allowing a law firm to build workflows that take a user through firm-defined processes, ensuring no missed steps.

Workflows
Workflows are built based on a firm's process and assist users in following each step. The first step might be entering a potential client's name into the system and filling out a contact card built on a custom form. The custom forms in Lawmatics are

Figure 1: Lawmatics' powerful automation platform provides a firm with the capability to build an automatically enforced process. From initial contact with a potential client through engagement and billable work, you can design protocols and trigger the next steps without ever leaving the system.

> **“Firms can have a pipeline for any of their processes, such as lead generation through engagement, client intake through fee agreement, or matter intake through case disposition.”**

highly configurable so that a firm can gather information based on the needs of each client. Fields are highly customizable and can be conditional. For example, if a form asks if the client has a spouse, when the answer is yes, the spouse's information is requested; otherwise, the user moves to the next question. *See Figure 1 on the previous page*.

Booking forms are tied directly to creating appointments and take the place of other calendaring applications. Tailor a booking form to identify the appointment type (e.g., phone, in-person meeting, type of meeting) and then pull up a calendar with availability options.

Document Automation

After completing a contact card, prompt a user to create a document. Lawmatics' document automation tool employs conditional logic and selects blocks of text based on chosen fields and values. Users leverage document automation features to pull information from a contact directly into an agreement. Generating documents in this manner eliminates errors and provides a workflow for approvals and signature collection.

Pipeline Management

The power of the Lawmatics automation platform is demonstrated clearly in the way a firm manages its pipeline. Firms can have a pipeline for any of their processes, such as lead generation through engagement, client intake through fee agreement, or matter intake through case disposition. All accounts automatically come with an intake pipeline. Creating a new one is easily accomplished through the settings gear, then add stages and implement automation triggers to move a matter between stages or to another pipeline. Lawmatics provides a customizable dashboard allowing a firm to see all phases of a pipeline. Examples of other pipelines a firm could create include case management and client events/webinars. *See Figure 2*.

Client Portal

The Lawmatics client portal provides an easy way for a firm and its clients to communicate and collaborate. You can engage via direct messaging within the portal along with SMS texting and alerts. Notifications are triggered when a text is sent, so no message is missed. The client portal provides a history of all communications as well as other information, such as documents, meetings, time and billing, and notes.

Marketing Automation

Engaging new clients is essential for firm success. Developing marketing campaigns can be difficult, time-consuming, and fraught with potential missed opportunities due to a lack of follow-through. Automating the process helps minimize and even eliminate that issue. Lawmatics empowers a firm to create drip

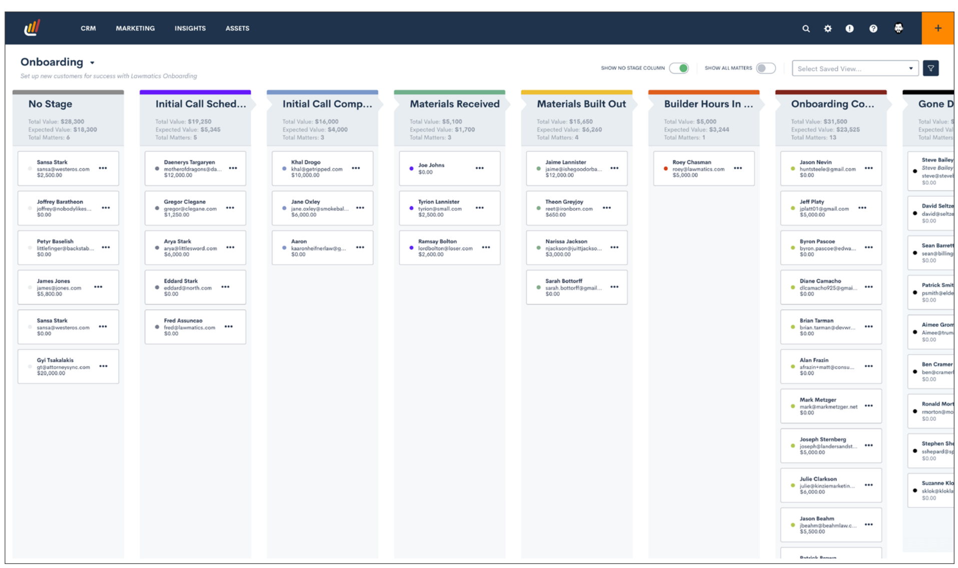

Figure 2: Lawmatics gives a firm the power to build its pipeline process and provides insights into that process. In this example, each phase of a sales pipeline is identified and shows potential leads. Information is easily accessible, and you can track related data points in other reports, allowing the firm to measure success.

> “Lawmatics provides insight via reporting into what is driving revenue so that a firm can focus its efforts on what is working. A firm can set lead and client development goals and track and measure success.”

campaigns as part of an automatic follow-up process with a lead or client. First, the firm builds email templates in plain text/HTML for a specific campaign and then identifies the conditions that trigger the automated email. For example, an email is sent when a matter or lead enters a certain stage in the pipeline. In another example, tracking client interests can trigger emails that provide related legal news. Drip campaigns can be sent once or employ time delays to determine the timing or frequency of the emails.

A firm can set up email campaigns based on pre-set criteria and timed triggers. This type of operation ensures the right message is automatically sent once an engagement letter is signed or a matter is concluded.

Automated text messages are another marketing tool a firm can use to increase client engagement. An event triggers these messages, such as scheduling an appointment. Once scheduled, an automated text message can be sent with confirmation of the meeting date and time.

Lawmatics offers the capability to create specific audiences for marketing efforts, such as filtering clients and leads by practice area or industry. Once an audience is created, specific information can be sent via automation when something related to that industry is published, such as a blog post, RSS feed, or a new legal opinion. Using audiences enables a firm to track the effectiveness of a campaign via statistics on opens, clicks, bounces, and more.

Reporting

Measuring the effectiveness of marketing efforts is critical to firm success, and management typically looks for ROI based on each marketing effort. Lawmatics provides insight via reporting into what is driving revenue so that a firm can focus its efforts on what is working. A firm can set lead and client development goals and track and measure success. Lawmatics provides easily digestible visuals that track what is important to a firm in real time. *See Figure 3*.

A firm can develop custom reporting based on what they want to track. Lawmatics has a report template library, or a firm can create dashboards and reports from scratch. A user selects the information they want to see via filters and drop-down menus. Use filters to narrow the focus of a report which can be based on date range, practice area, status (e.g., hired or lost), source, and relationship attorney. Any data point important to a firm can be added and used to limit a report, and multiple filters can be used with AND/OR conditional relationships. Once a report is generated, you can apply grouping for an alternate view of the data, such as by practice group.

Security

Lawmatics works to keep client information secure by implementing

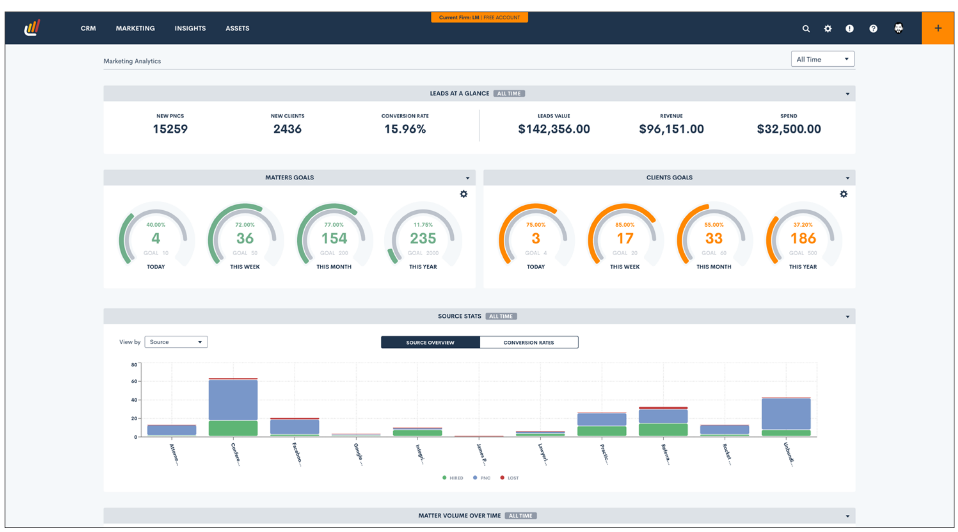

Figure 3: A firm can track leads generated by different marketing campaigns, matter and client goals, the value of leads in the pipeline vs. spending, and much more. Lawmatics harnesses the power of AI to analyze information and deliver actionable data points.

stringent protocols and technology. Lawmatics is hosted on Amazon Web Services (AWS), with state-of-the-art security and privacy features built into the platform by default. This includes 256-bit AES encryption of stored data, data sent and received using 128-bit SSL encryption, two-factor authentication (2FA), and nightly backups to redundant Amazon S3 servers. Military-grade physical protection is also in place with 24-hour security escorts, and all staff are trained and updated on the latest technology security protocols.

Integrations

There is an open API developer platform and a host of existing integrations with several applications. Lawmatics currently integrates with Clio Grow, Practice Panther, Rocket Matter, Filevine, and Smokeball for matter and practice management, WealthCounsel for trust and estate planning, and LawPay for invoicing and payments. Integration with Zoom, CallRail, and RingCentral is available to track communications. There is also integration with Zapier to connect apps and automate workflows.

Pricing

Lawmatics' base price is $249 per month and includes three users, 15,000 contacts, 100 automations, and 400 eSignatures per month. It also includes the HTML and plain-text email builder, full analytics and dashboard, and custom reporting. Add users at $59 per user per month, add contacts at $25 per additional 5,000, and add eSignatures at $0.10 each.

There is a $399 one-time setup charge and a 12-month minimum agreement. Two-way SMS messaging is $25 per month, the time and billing module is $29 per month per user, and a user must have a Lawmatics user account. You can reach out to Lawmatics to discuss custom pricing for your firm.

Who is Lawmatics?

Lawmatics was founded in 2017 and is based in La Jolla, California. With approximately 50 employees, Lawmatics provides an automation platform for law firms, offering legal client intake, CRM, marketing automation, billing, and much more. The client relationship management platform provides a law firm with comprehensive tools to streamline operations and capture more business.

Why Buy Lawmatics?

- Powerful automation features to ensure process consistency.
- Track ROI related to automation and marketing.
- At-a-glance pipeline management.
- Centralized information to expand and improve data insight.
- Automations save time to focus on client needs.

Try Lawmatics Today!

Schedule a demo of Lawmatics today and follow Lawmatics on LinkedIn, Facebook, Twitter, and Instagram.

MOXO

Improve your Firm's Processes with a OneStop Hub to Manage Client Interactions and Create Client-Centric Digital Workflows

> "The OneStop portal allows users to work together when managing tasks, instant messaging, video messaging, making video calls, and sharing/annotating documents. Users can set up virtual data rooms to share documents in a centralized data workspace, providing one place to keep records of all shared, categorized, and annotated files."

Company Name Brand
Moxo

Product Name Brand(s)
Moxo Flow, OneStop™ Client Interaction Hub

Latest Developments and Updates

- Major rebranding of Moxtra – now Moxo.
- Launched Moxo Flow, updating the platform for law firms and legal professionals to streamline client-centric business workflows for the complete client management lifecycle, including account onboarding, account servicing, and exception handling.
- New integrations with HubSpot and Salesforce.
- Filevine integration launches soon.

Increase Operational Oversight
Many moving pieces are involved in managing client relationships and matters. Many law firms have separate systems for interacting and collaborating with clients and staff. The struggle to administer and oversee multiple elements in disparate systems can cause follow-up delays and service delivery errors, taking valuable time away from strategizing on a matter and consuming more time putting out fires due to miscommunication. The Moxo platform provides law firms with a way to seamlessly interact and engage with clients digitally to improve overall efficiency.

Client Portal and Business Portal
Firms can personalize their client and staff experience with a configured portal delivered under their brand. The portal is designed for clients, customers, or partners to interact with their legal teams and is available in both web and mobile applications. Additionally, legal and business teams can engage and collaborate within the portal. The OneStop portal allows users to work together when managing tasks, instant messaging, video messaging, making video calls, and sharing/annotating documents. Users can set up virtual data rooms to share documents in a centralized data workspace, providing one place to keep records of all shared, categorized, and annotated files. Interactions can be made in real-time with an internet or data connection, regardless of whether a user is running the mobile app or web version. *See Figure 1*.

Create a digital workspace to manage and streamline client interactions, meetings, and

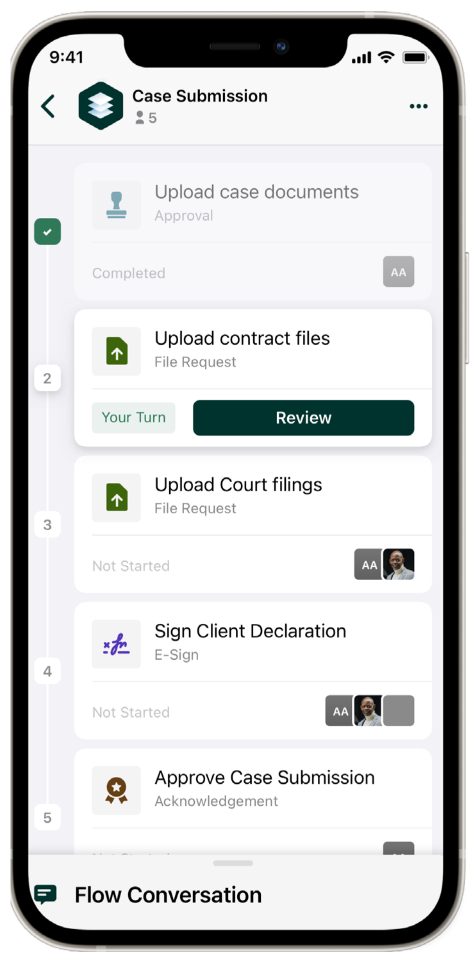

Figure 1: The OneStop mobile app displays the flow for case submission, showing the completed first step and a user's turn to review as the next step.

> "Moxo has gone even further to help teams collaborate, providing client-centric workflows through Moxo Flow to bring all pieces together and further manage interactions through digital workflows."

> "Moxo has an open API, allowing users to create integration with existing applications, including email, customer relationship management (CRM), document management systems, and e-signature applications."

tasks. A team can use Moxo's video and conference calling functionality, where you can share documents via the screen-sharing feature. A user can markup documents using annotation tools such as draw, comment, highlight, and more. You can access a clean, annotation-free document in the content library while the marked-up document is stored in the workspace.

Workflows

Moxo has gone even further to help teams collaborate, providing client-centric workflows through Moxo Flow to bring all pieces together and further manage interactions through digital workflows. You can use Flow to automate processes and streamline document creation, driving time and cost efficiencies.

Create a flow in just a few steps. Identify the business process; identify each step or action within the workflow (such as approval, acknowledgment, file request, e-sign, or task); assign each action to a role on the team (such as a partner, associate, paralegal, or client); and identify any message to include that may give insight into the action and what is required.

Access Moxo Flow via the left navigation panel in the portal. Once Flow is open, a user sees existing workflows. Clicking a flow shows the actions required for that business process. For example, a client onboarding process shows the type of actions available to add in the left panel, while the main panel displays the steps added to the workflow. *See Figure 2.*

Drag and drop actions into the workflow, follow the prompt to assign the action to a team role, and add any message necessary to provide insight and requirements for the action.

When a flow is started, a user sees a notation in the communication timeline and an indication of workflow progress. For example, a user can see a case submission under the timeline when a case submission is started. The Flow is displayed in the center panels along with the status, such as in-progress or overdue. The system shows when a user has an action item with a "your turn" status message. In the far-right panel, a user can see all steps and actions taken along with any interactions. *See Figure 3 on the next page*.

Security

Moxo enables the seamless extension of business processes. The digital solution can be deployed as a private cloud, shared multi-tenant cloud, or on-premises for enhanced security. Administrators control access to cases through role or group-based permissions. Data is fully encrypted in compliance with the E-Sign act. Moxo is engineered to meet the stringent security requirements of regulated industries with best-in-class compliance, including SOC III, GDPR, and PSD2.

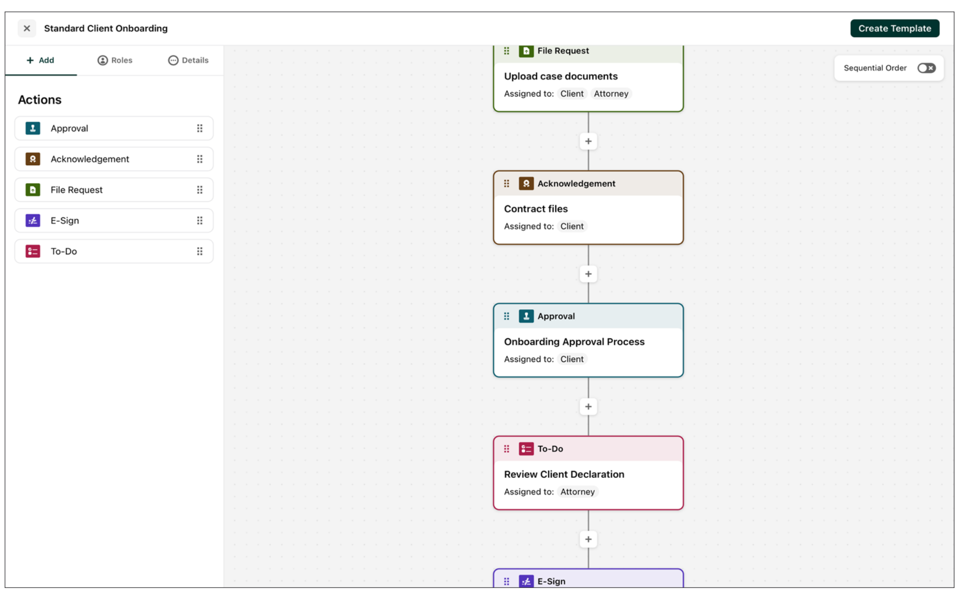

Figure 2: An example of a standard client onboarding template shows a list of all action types available to include in the workflow. The right panel shows the added actions. Each action can be assigned to a role (client, attorney), and when triggered in a workspace, the task is assigned to the team member in that role.

Integrations

Moxo has an open API, allowing users to create integration with existing applications, including email, customer relationship management (CRM), document management systems, and e-signature applications. Moxo integrates with HubSpot, Salesforce, Dropbox, Google Drive, Box, and OneDrive document repositories. Moxo evaluates and develops integrations as requested by clients. Moxo provides access to an API/SDK with the advanced package, allowing users to create their own integrations with applications specific to their needs. Contact Moxo to get a complete list of existing integrations.

Pricing

Moxo has monthly and annual pricing options. In addition to the pricing below, add-on and custom pricing are available. Contact Moxo for specific pricing questions.

Who is Moxo?

Moxo provides a OneStop Client Hub to manage client interaction workflows through modern digital automation and relieve the chaos of fragmented silos. Streamline deadline-driven client interactions, including account onboarding, account servicing, and exception handling. The Moxo team has a rich history of pioneering in the engagement space. Moxo co-founder and CEO, Subrah Iyar, was the co-founder and CEO of Webex, and Moxo co-founder and CTO, Stanley Huang, held senior engineering management positions at Cisco Systems and WebEx. Moxo headquarters are in Cupertino, California, with offices in London, New York, Amsterdam, Bengaluru, Shanghai, and Singapore. Moxo was named the winner of the 2021 LegalTech Breakthrough Awards. Learn more about Moxo through client success examples Marcela Halmagean Law and Adaptive Law Firm.

Why Buy Moxo?

- Moxo Flow enables an organization to automate routine tasks and configure custom workflows that align with business processes.
- Mobile and Web Apps are intuitive and provide complete access to a matter.
- Streamline client-centric processes through automated digital workflows with task dependency encouraging consistency and defensibility.
- The OneStop Client Interaction Hub provides a configurable, personal, and modern solution for servicing clients in the digital world.
- Establish better operational oversight over all interactions with end-to-end client management.

See Moxo Today!

Schedule a demo today or email Moxo at contact-us@moxtra.com. Follow Moxo on LinkedIn, Twitter, Facebook, and Instagram.

Starter	Business	Advanced
• Pay Monthly: $100/month (annual commitment) • Pay Annually: $1,080/year ($90/month)	• Pay Monthly: $480/month (annual commitment) • Pay Annually: $5,100/year ($425/month)	• Custom pricing
• 10 Active Users* – Additional User Packs Available • 3 Workflow Templates • Includes: – Client, Business, Admin Portals – Messaging, Video Meetings, File Sharing, Approvals, Acknowledgements, To-dos, File Requests, Digital Signatures – Workflow Builder and Templates	• 40 Active Users* – Additional user packs available • 10 Workflow Templates **Everything in Starter, plus:** • 3rd party integrations • Reporting • Audit • Live Chat • Service Requests • SAML SSO • *Private labeled app add-on available*	• Custom User Pack • Custom Workflows **Everything in Business, plus:** • API/SDK access • Option for private cloud • Option for on-premises

*A user is considered an active user in a given month if they complete at least one action within Moxo. Actions include sending messages, sharing files, scheduling/joining meetings, signing documents, filling out forms, or completing approvals/acknowledgments. Users include both internal and external users.

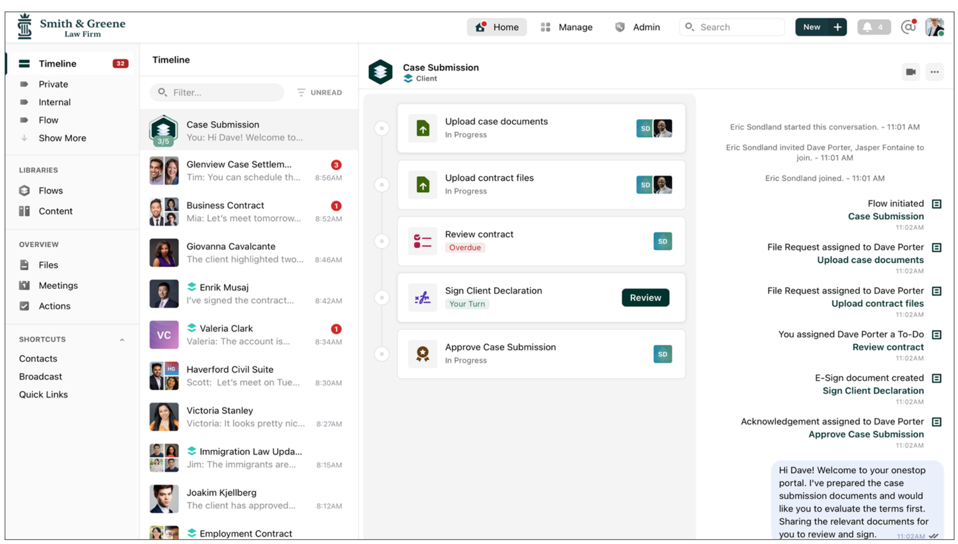

Figure 3: An example of a timeline with case submission flow selected displays all steps and their status. The far right presents a conversation panel that tracks the initiation of the flow and a place for a team to collaborate.

MyCase Lets You Do More of What Matters with All-in-One Law Practice Management Software for Small and Midsize Law Firms in All Practice Areas

> "In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management."

Company Name Brand
MyCase, Inc.

Product Name Brand(s)
MyCase, MyCase Payments, MyCase Websites

Latest Developments and Updates

- Mailchimp integration to automate leads and retain new clients.
- Smith.ai integration for telephone receptionist support and messaging.
- Communicate with staff using secure, internal chat.
- The new contact report, which uses customized columnar data and filters, paves the way for full custom reporting.

Roadmap Development

- Integrate with Zoom to schedule online meetings.
- Integrate with telephone messaging service, LEX Reception.
- Synchronize cloud-based documents on the desktop using **MyCase Drive**.
- Offer an in-house accounting suite, **MyCase Accounting**, with three-way reconciliation for expense, operating, and trust accounts.

Manage Your Firm with Increased Efficiency
All-in-one legal practice management (LPM) software, like MyCase, provides efficiencies and time-saving opportunities for busy small and midsize law firms. The company's software-as-a-service (SaaS) platform manages law firm financials, operations, and practices from generating leads and client intake to case management, time and billing, and payment processing. MyCase includes case, calendar, contact, and document management and automation with advanced communication and collaboration tools. Also available are time and billing features, lead tracking, intake forms, client portals, and reporting. MyCase drives product advancement through in-house feature development and offers unlimited data storage to support your firm's growth.

Modern User Interface
MyCase continuously updates its user interface to maximize efficiency. The dashboard presents card-based visuals of financial overviews, open cases, recent activities, and a linear graph of leads generated over time. Dashboards include

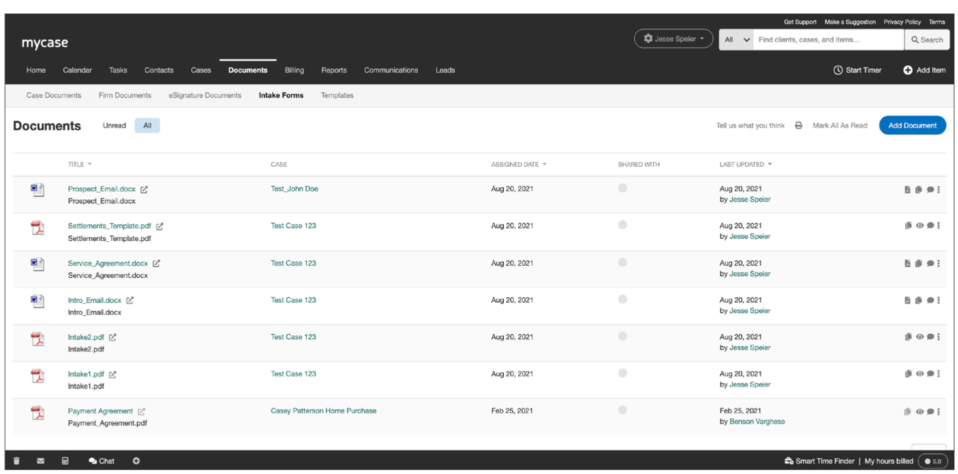

Figure 1: MyCase's user interface for cloud-based document storage.

user tasks, events, alerts, and communications, including email and SMS texts. A persistent top panel navigates users to primary functions, including matters, contacts, calendars, tasks, and documents. The panel includes a global search window and a facility to add new information, including leads, contacts, tasks, events, documents, time and expense entries, invoices, and messages.

Lead Management

Most cases begin with a client lead. MyCase has a built-in feature to create and track leads until they become clients. Alternatively, if the client does not yet retain the firm, the information can be maintained for conflict or compliance purposes.

A firm can generate leads using intake forms and embed contact forms onto the firm's website using iFrame. They also have a service to build your website with all of these key integrations directly into MyCase. To help convert prospects into clients, MyCase Websites offers a customized site with optimized design, MyCase workflow integration, and search engine optimization (SEO). Lead tracking includes information on potential case details, communication, and the ability to accept payments for new client consultations. You can also save calendar events, documents, tasks, and more.

If you need to manage referrals, you can use lead tracking functions or adapt the process and improve your firm's workflows with custom fields. MyCase allows unlimited custom fields to track, manage, and report discrete data.

In one click, convert a lead into a client, create a client portal, and select a billing method (hourly, contingency, flat fee, or pro bono). MyCase converts the lead data to client and case management. If the firm has an account with MailChimp to manage marketing channels and leads, MyCase can automatically synchronize lead and contact information to the case management dashboard in MyCase.

The communication features for lead tracking and case management include centralized two-way text messaging that can be retrieved and replied to on Apple iOS and Google Android devices using MyCase mobile apps. Whatever you can do on the web, you can do on mobile devices, with the exception of batching and sending bills.

Communication features include call logs, which record telephone messages entered by staff or an outsourced service, such as Smith.ai. MyCase supports secure real-time internal chat with staff and communications with clients via secure web portals. The software has a built-in mailbox feature to mirror users' email in the MyCase UI, so users can send and receive mail as if they were in their native email application, and then save messages within MyCase.

Case and Document Management

The *raison d'etre* of an LPM is case management. In MyCase, the function includes unlimited storage for document management and automation along with in-depth time and billing features. Additional aspects include status updates, related contacts, staff assignments, and case communications, such as email, texting, and call logs.

MyCase's document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents. Send retainers to a potential client for signature using the company's built-in eSignature feature. The e-sign function in MyCase supports multiple signers with a firm countersign.

Email an agreement to a client to sign using a drawn signature or text. The e-sign process transforms a Word document to PDF. From there you can insert text and signature fields to complete. When the deal is finalized, it's automatically stored in your firm's case documents.

A user can create documents on their PC in the word processing software of their choice. When they upload it to MyCase, it becomes part of the case record. Open the document to edit, and changes are saved to the cloud with version support. MyCase is currently developing a MyCase Drive that synchronizes desktop documents with cloud-based storage, similar to Microsoft OneDrive and Google Drive (GDriveFS). *See Figure 1 on the previous page*.

Time and Billing

Time tracked on your computer and mobile apps accrues to the time and billing section of the appropriate case to await invoicing. MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees.

MyCase supports batch invoicing and the application of trust funds and credit card payments. MyCase Payments supports automated check handling (ACH) and credit card processing. Although there is no extra charge for ACH, there is a processing fee for credit card transactions. *See Figure 2*.

Reporting

Select from many standard reports to detail firm financials, productivity, contacts, and lead information. Financial statements include aged invoices, accounts receivable, fee allocations, case revenue, trust accounts, and electronic payments with credit card fees and payouts. Contact

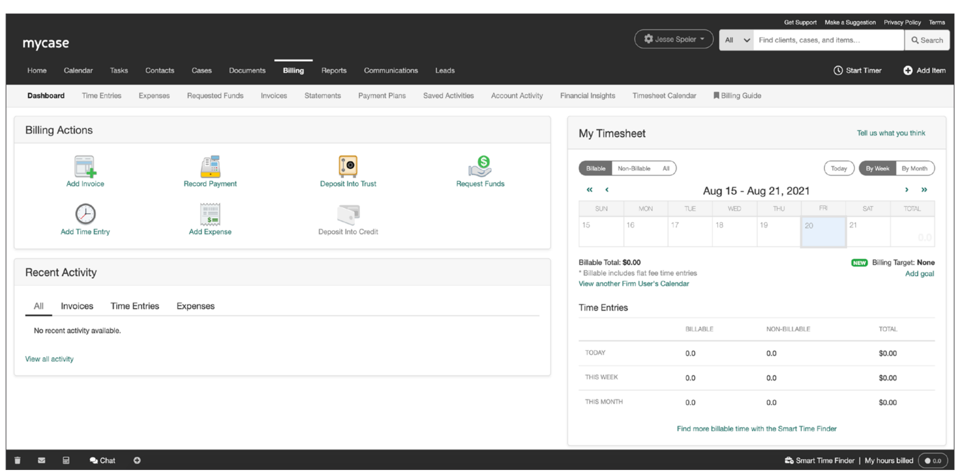

Figure 2: MyCase's time and billing page allows law firms control of their financial health.

> "MyCase's document automation works throughout the entire case lifecycle, from lead generation to signing clients to closing cases. Create unlimited templates with merged data fields from MyCase to draft client retainers, memoranda, and court documents."

> "MyCase stores trust and credit balances, time records waiting to be invoiced, expenses, and invoices, and handles payment plans, discounts, and interest charges for late fees."

reports display case lists and the applicable statute of limitations. Lead information shows their forecasted pipeline value, referral sources, and revenue from consultations.

MyCase is developing custom reporting, which takes standard reports and applies filters for date ranges, client, case, lead attorney, and more. For example, customize a new contact report by selecting columnar data for address and birthdate, and filter them by contact type (lead, client). Export reports to PDF or CSV, save any results to rerun on-demand and refresh the data with just one click. *See Figure 3*.

Integration

MyCase also integrates with software tools used by many law firms. MyCase synchronizes data with Google and Microsoft 365 calendars and integrates with Intuit QuickBooks online, CalendarRules, Mailchimp, DropBox, and Smith.ai. Later this year, the company will add integrations with Zoom to schedule online meetings and LEX Reception for legal call reception and messaging.

Pricing

All features, including lead management, billing, and MyCase Payments, are available for one low price of $59 per user per month billed annually or $49 per user per month billed monthly.

Who is MyCase?

Founded in 2010, California-based MyCase offers small and midsize law firms integrated law practice management software as a service. The company's all-in-one LPM feature set aims to help law firms become more efficient and productive as well as improve the client experience. Led by Chief Executive Officer Jim McGinnis, along with Apax Partners, MyCase continues to grow, innovate its software, and increase its integrations with other legal product offerings. It recently acquired Soluno, a cloud-based accounting system, CASEpeer, law practice management software for personal injury practices, and Woodpecker, Microsoft Word-based legal document automation software. The company has a dedicated development team in San Diego with marketing, sales, and support teams in Santa Barbara.

Why Buy MyCase?

- Anyone in the law firm can find value in MyCase's intuitive interface and easy-to-learn features.
- MyCase keeps all vital case information in a single, organized, cloud-based location, accessible 24x7 from anywhere, anytime, via web and mobile apps.
- The all-in-one legal practice management software manages the entire lifecycle of cases for a predictable monthly subscription—no long-term commitment required.
- MyCase meets customer demands with organic growth, targeted integrations, and strategic acquisitions.

Try MyCase Today!

Start your free MyCase trial today.

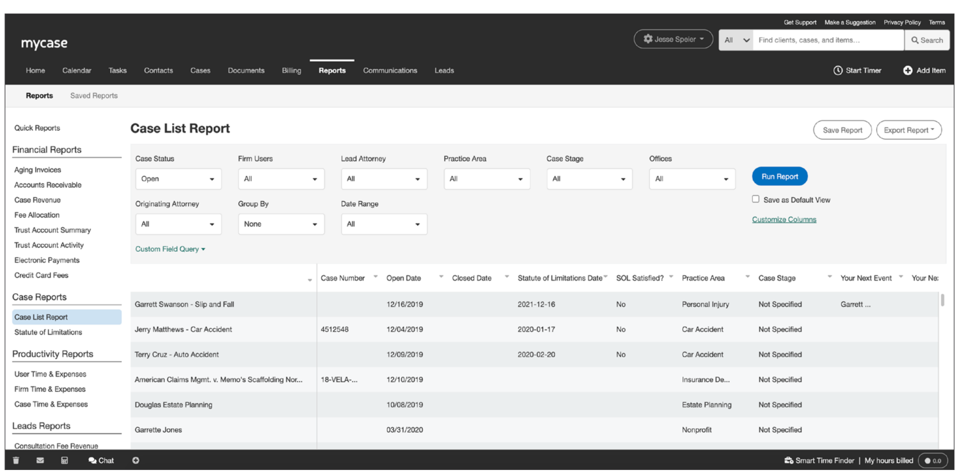

Figure 3: MyCase's standard and customized reporting tools chart paths for law firm productivity and prosperity.

Thank you for reading, let's keep in touch!

We appreciate the time you spent researching solutions for your law firm. New products, feature updates, and announcements happen throughout the year. So, to help you stay informed we have expanded Legal Tech Publishing's Buyer's Guide Series to include an eBook for nearly every product category. Subscribe to receive notifications when a new guide is released. Follow us on the channels below for updates and special virtual events.

Subscribe to our Vimeo Channel

Follow us on Twitter

Like us on Facebook

Follow us on LinkedIn

This buyer's guide is supported by vendor sponsorships. The products and services selected for the guide are done at the author's discretion. Reviews are also written to reflect the opinion of the author. Each product or service must first be selected for the guide, then invited for inclusion before sponsorship is requested. Additionally, emerging technologies who do not have funding to pay for sponsorship are included based on the level of value they offer to law firms. All sponsorship proceeds go towards the costs associated with the production and distribution of the guide.

LegalTech PUBLISHING

legaltechpublishing.com