



THE MODERN CLOUD-BASED LAW FIRM SAAS APPS TO MAKE YOUR LAW FIRM MORE EFFICIENT

crozdesk™

Having worked in the legal sector, I have seen first-hand the challenges facing the industry in 2015. The impact of technology in the form of instant communication has dramatically increased the pace at which clients expect work to be delivered, while the prevalence of legal information on the internet means that legal professionals now have to work harder to earn their worth in the eyes of increasingly informed clients. As well as presenting challenges, advances in technology present many opportunities for the modern law firm, through the wide range of legal SaaS products on offer, enabling them to streamline the way they function and stay ahead of the competition:

SaaS Apps for Legal Research

Accurate, thoroughly researched legal advice has never been more important for lawyers wanting to please and retain clients. Legal fee-earners rely on good research – whether their own, or that of Paralegals and Legal Assistants. Such research will aim to explore legal precedents and gain an overview of legislation on a particular issue. Case history, precedents and legislation constantly change; SaaS apps are the perfect way to ensure information is up-to-date. Traditionally, apps such as LexisNexis and WestLaw have been used for this purpose, and while they are cloud-based, there are now a range of new SaaS apps challenging these major players and transforming the task of legal research:

Fastcase

Cloud-based legal research software Fastcase offers users features which are not available on more mainstream legal research sites. Offering the usual legal citation search functionality and comprehensive, up-to-date legal databases, Fastcase also offers users a unique ranking system for search results. This system is designed to cater for the fact that legal research almost always involves delving into a very specific area of law rather than generically searching for cases. This presumption has led the Fastcase team to feature a search function which shows not only how popular a particular case citation is in terms of how many times it has been cited in other cases, but also demonstrates its popularity based on how many times the term has

been cited in that particular area of law, providing search results which are arguably far more relevant.

Other functionality includes a URL function which allows the URL of a specific search to be emailed to a clerk or assistant, for them to then re-run the search from where you left off. Of particular note is a distinctive data visualisation search tool, which allows users to display all cases on a particular topic on a timeline, easily showing when that area of law became most prevalent; hover-over options within the display also allow instant access to top-line details about the case. This innovative feature makes it far easier for users to gain an overview of the legal landscape in a particular area of law and across a particular period of time. A feature which is likely to be particularly popular with law students cramming for exams!

Ravel Law

Ravel Law is a legal research app designed around data visualisation. Performing a search will give you a list of cases ranked by relevance, accompanied by a map containing the top 75 cases from your search. Circles within the display are sized according to the number of citations that each case received, with each circle representing a case. Larger circles receive more citations, these are likely to be seminal cases. Lines connecting cases show citations between them and arrows show the direction of the citation. Features such as the court filter can be used to sort results. This shows the court level from which a case originated and the case publication date. Another filter groups cases sharing a citation network and which therefore relate to each other. Ravel also employs “big data” technologies to increase the power of their case analytics function. The Star Reading System provides guidance about the most important passages in each case and helps lawyers identify subsequent areas for analysis. Opening a case on a particular area of law will also open all subsequent discussion of this main case in other case law and display it to the left of the main case. Ravel then analyses the citations from each page of the main case and alerts you to high levels of discussion with the star rank. The more stars a page receives, the more the main case has been discussed by other cases.

Most interestingly, Ravel also analyses each page of a case citation in relation to each page of the main case and determines the context and manner in which the main case is being interpreted by those cases. Ravel then groups these case discussions by the nature of their interpretations, so you can see how the other cases analyse the main case. Ravel is unique in the sense that it performs all this analysis on one page, along side the main case you are previewing. The use of algorithms to analyse the law might sound slightly unnerving and a little sci-fi, but Ravel has the potential to transform legal research with this in-depth analysis feature.

One other feature worth mentioning is Ravel’s intriguing Judge Analytics function, with the aim being to provide a detailed insight on every judge within a particular jurisdiction. Currently limited to the USA, the tool provides information about the cases and courts a judge has cited in the past and which they might be predisposed to hear arguments from. The idea behind this is that it makes available the kind of in-depth knowledge which could only previously be made available by an army of legal researchers and a huge budget.

SaaS Apps for Legal Case Management

The legal profession is client-servicing by nature: a fact which brings with it a raft of tasks which relate to each particular client, matter or case that a law firm handles. Correspondence must be sent, paperwork must be scanned and stored securely, appointments must be diarised,

case notes and billable time recorded, to name a few. Added to this are the complexities of keeping track of legal processes and dates such as court deadlines or document submission deadlines. Finding technology which can effectively bundle these tasks into one application is a challenge. Any effective case management system needs to facilitate and organise this array of tasks, as well as enabling a law firm to keep track of communication with clients for each case. The best systems will also offer clients numerous contact channels, enabling contacting their lawyer to be stress free. Finally, these systems will need to be bespoke, and adaptable to the individual needs of each law firm – customisability is key to a good case management system. There are now a range of specifically designed legal case management SaaS apps available:

Mycase

Mycase claims to be the only legal case management software to feature a secure client web portal allowing clients to view, download and comment on documents. This is likely to be an invaluable feature for firms wanting to improve the level and quality of communication they have with clients. Other features include collaborative calendaring, document management, easy case note recording and a function which allows tasks to be created and delegated. MyCase also offers a document generation function, which aims to remove the hassle from generating complex formal legal documents. At the click of a mouse, a pre-created document template stored on the system can be populated with the relevant client and case details, greatly expediting the task of producing correspondence. A limited set of financial features is also available, including time and expense tracking, the ability to receive online payments from clients, online reporting of billable time and invoice creation.

Proclaim Case Management Software

Proclaim offers a comprehensive case management software for law firms, and is used by over 22,000 professionals in a number of different sectors. The software offers powerful data storage; fast and efficient production of documents, based on a wide range of templates; a searchable document library of scanned documents providing a crucial knowledge store for research and new business prospecting tools linked to all major social media channels. A diary and task management function, along with seamlessly integrated cost and budgeting tools are also on offer.

LegalTrek

Compatible with all major browsers, LegalTrek’s user interface centres on a main daily schedule screen which includes personal and company events and tasks by day, week or month. A client management module shows personal or company wide client lists, depending on user access preferences. A separate matters module shows user involvement with matters and offers users a status update for each matter. LegalTrek allows documents to be attached to clients, matters or tasks and a document assembly module automates frequently created documents. A billing management module shows charges and billable time filtered by client or matter.

HoudiniESQ

An entirely web-based product, HoudiniESQ can be deployed in-house or in the cloud and is accessible from nearly any device. Feature-rich and flexible, HoudiniESQ claims to centralise vital data and communication by managing clients, leads, contacts, contracts and schedules as well as retainers, expenses, time and billing. A search function enables efficient access to

all data, documents, emails and email attachments, while a built-in document generation tool allows documents to be generated and sent. The service integrates with a wide range of software including Word, Outlook, Excel, WordPerfect, Acrobat, QuickBooks and OpenOffice. A case management workflow function enables streamlining of processes on each case and ensures that tasks do not get missed. Flexibility is key to the software - it is fully customisable and can therefore be adapted to suit the needs of individual firms.

DocuSign

While not a case management app, DocuSign makes online document signing simple and secure – a highly useful tool for the modern law firm. Users can upload documents for signing in a variety of formats, mark the fields for signing and add the names of signatories. Recipients will receive a link to a secure portal where they can sign and return the documents electronically.

SaaS Apps for Legal Time Recording

While the case management apps mentioned above do incorporate time recording, it is worth mentioning two specific time recording apps which may prove very useful to the busy lawyer:

Bill4Time

Bill4Time is a time recording app that allows users to easily record and keep track of billable time. The software can be accessed from a smartphone or tablet and features one-click time recording and one-screen batch entry, as well as a diary sync function which allows appointments and time entries to be consistent. Customisable and batch invoicing, as well as 24/7 client access to a secure payment portal along with a Quickbooks plugin, make this software highly relevant for the modern law firm. Bill4time also Features a customisable dashboard allowing users to review and track detailed activity relating to billed time.

Chrometa

A passive time recording device, Chrometa automatically captures all billable time by running in the background and making note of your activities. Open or compose an email, draft a document, conduct web research, and your time is captured automatically. Time is grouped by application and the app gives a breakdown of time by activity. Chrometa automatically starts its own timer by monitoring keyboard and mouse activity – very useful because it avoids the need for a fee-earner to stop or start a timer each time they move from one task to another.

SaaS Accounting Apps for Law Firms

Proclaim Accounts

Proclaim Accounts can be used in conjunction with Proclaim and provides control of account information, with security preferences for each user. Proclaim Accounts caters for the full range of financial postings, including standing orders, direct debits, prepayments. Reversal of erroneous postings can be done efficiently and “quick postings” can be performed from within individual matter screens. Other features include an office and client ledger display; colour coding of positive and negative figures; a display of underlying double-entry detail; full billing details related to profit costs, VAT and disbursements; allocation of monies received and the ability to insert narrative to explain entries.

QuickBooks

Cloud accounting software Quickbooks can be tailored to the specific needs of a law firm, via the Quickbooks MyCase Law plugin. Describing itself as “the most robust integration in the legal practice management industry”, the plugin provides a one-way sync of your firm’s My-Case accounting data into QuickBooks. There is no monthly fee for this sync, only a one-off fee of \$99. The app provides synchronisation of detailed invoice data, recording of payments on invoices, trust account transactions, cash and accrual accounting among other features.

The Modern Cloud-Based Law Firm

The benefits of subscription software are well known, whether it is the latest film from Netflix, cloud file storage, or an innovative solution for marketing your business. It is clear that the legal industry is no exception; the range of specific legal SaaS software means that law firms need not operate as they have done previously, tied to outdated and poorly fitting server-based software.

California-based Attorney at Law, Zachary C. Strebeck, an early-adopter of SaaS legal software, is certain these apps have changed the way he works: “It’s an exciting time, with all of these digital tools, I’m able to run my practice from anywhere in the world. I’m completely virtual, so I basically live and die by these services.” If this ringing endorsement of SaaS software in the legal workplace is anything to go by, cloud-based legal software solutions are set to have a significant impact on the worldwide legal industry.



At Crozdesk we love the way SaaS solutions make our lives easier. Each member of the Crozdesk team has their tried and tested favourites when it comes to web apps, but we wondered which apps are in favour with the great and good of the SEO and link-building world. With our curiosity piqued, we decided to ask the leading lights of SEO what single web app they prefer or currently use most, to be precise, we asked:

“The Crozdesk Team were wondering: What is your favorite/most used Web App and why?”

Many thanks to all who replied, most of the recommendations are for apps we know and love but a few surprised us – in a good way! Here’s what they said:

#1: Julie Joyce recommends Evernote

SEO expert and owner of link building company Link Fish Media Julie Joyce was the first off the mark, championing Evernote for its organisational efficiency. Evernote is ideal for saving notes, tracking tasks and saving things you have done online. Set reminders, collect and organise information from around the web. Write notes, save clippings from web articles and collect photos in one place. Evernote allows you to connect and collaborate with people you work with and friends in real-time, without leaving the Evernote platform. Once you’re done, transform all your hard-work into presentation material at the click of a button with screen-friendly layouts. As Julie points out, Evernote works seamlessly across web, mobile and tablet platforms and is ideally suited to organise information for personal or business use.

#2: Irish Wonder prefers Majestic

It’s no surprise that @IrishWonder recommends 2015 US Search Award winners, Majestic. This powerful search analysis tool surveys around a billion URLs a day and has reportedly created the largest commercial Link Intelligence database tool in the world. Majestic is designed for anyone looking to understand the link profile of their site, as a means of enabling rational study of Search Engine positioning. Weapons in the Majestic armory include: Site Explorer for detailed domain or URL analysis; Search Explorer for supercharged keyword analysis; Webmas-

ter Tools offering extended domain information relating to your own site, a backlink checking functionality and many more!

#3: Charles Ngo champions Asana

Affiliate marketing guru, Charles Ngo selected task management tool Asana. This fantastic tool can be used to track your projects and have conversations about your work, all in one place. Other features include sections allowing you to customise Asana to match your project workflows; due dates options, to ensure that tasks are completed on time, and the ability to add files from your Desktop, Dropbox, Box or Google Drive to any task or conversation. Users can also convey approval or affirmation of a task with the heart function and comment directly on tasks to clarify exactly what needs to be done. Furthermore, team pages enable all a team’s projects to sit in one place. This great tool can also be integrated with Dropbox, Slack, Chrome, Okta, Github and Google Drive.

#4: Bob Jones opts for Basecamp 3

Founder of full-service digital marketing and SEO agency Visible, Bob Jones recommends collaboration and project management tool Basecamp 3. Basecamp 3 is designed to facilitate team and project-based communication. Each new team project or “basecamp” you create will have six separate components designed for efficient management of that project:

- Campfire: An instant chat window allowing team members to communicate with one another in real-time.
- Messages: A forum-style communications function allowing team members to post new topics which other users can comment on.
- To-Do’s: A list of shared team tasks, each task is made-up of a series of to-do’s which are user-added and can be assigned to individual team members or left open for anyone in the team to do. To do’s can be scheduled for a specific date and time and notes or files can be added to each to-do.
- Schedules: A calendar function allowing appointment and event scheduling.
- Automatic Check-in: Pre-scheduled messages or reminders, which go out to your team on a regular basis. You can send them daily, weekly, or monthly. Everyone in the Basecamp can see the responses.
- Docs and Files: Team file storage facility featuring drag and drop uploads and version control.

#5: Matthew Barby chooses Trello

Matthew Barby, Global Head of Growth & SEO at HubSpot uses project management app Trello:

The Trello board, a list of lists filled with cards for use by a team, forms the focus of the app. You can drag cards between lists to show progress, add people, and re-order lists as necessary. Trello is set up to adapt to your project, team and workflow. The app updates in real-time and is designed to be intuitive to use. Post comments for instant feedback and upload files from your computer, Google Drive, Dropbox, Box, and OneDrive. Checklists, labels and due dates will ensure you stay on top of your tasks, while notifications let you know when important events occur.

#6: Steven Macdonald boosts his productivity levels with SuperOffice

Steven Macdonald, Content marketing, SEO and Conversion Rate optimisation expert at King-spout, recommends all-in-one CRM solution SuperOffice. Integrating with all MS Office applications including Microsoft Office 365, Google Apps for Work and email apps such as Exchange, Outlook, Notes, Gmail and all IMAP based mail servers, SuperOffice CRM helps store important customer contact details in a central location for everyone in your organisation to access.

Whether it's contact details, emails, phone calls, documents or meeting notes. A shared calendar function allows activity scheduling, project planning and availability tracking – if everyone's busy, the system will automatically provide an alternative date when all team members are free. Appointments are tracked in the system so that you can always go back to see what happened when. A simple-to-use mailing tool can send visually attractive, customised emails and documents. The optional calendar synchronizer will ensure your SuperOffice calendar is never out of step with your diary in Outlook, Exchange or Google. This versatile and adaptable tool was not one we had come across before at Crozdesk – thanks for the heads up Steven!

#7: Giuseppe Pastore favors Freedcamp, MicrositeMasters, Trello and Evernote

SEO, Content and Link Building specialist Giuseppe Pastore uses a host of web-app solutions including Freedcamp for project management, MicrositeMasters for accurate SERP tracking, as well as Trello and Evernote:

Freedcamp

Project organisation hub, Freedcamp aims to make project organisation, time and task management simpler and more efficient. Features include a dashboard, task lists and stickie notes, as well as individual and group task assignment and prioritisation. Interestingly, Freedcamp's core functions are, as the name suggests, completely free to use. Business users can however opt to pay for business-focused features as and when they need them, these features include:

- CRM: Contact and campaign management is the aim of this feature, users can also stay on top of deals and leads with minimal fuss: \$12.99 /month.
- Issue Tracker: This feature handles more complex tasks and offers saved searches, bulk actions, advanced status options and unique issue ID's: \$10.99 /month.
- Invoices: Create and send visually attractive invoices; this function also integrates with Freedcamp's time tracking app: \$6.99 /month.
- Wiki: Advanced document creation tool, Wiki, includes multiple version functionality and the option to make the documents public or private as necessary: \$2.99 /month.

Microsite Masters

Microsite Masters is an SEO toolbox that offers accurate and up-to-date ranking information for websites and keywords. Microsite Masters allows you to measure the impact of your SEO groundwork on your search rankings. Advanced tracking metrics include daily rank tracking and advanced campaign management tools, allowing a trial and error approach to SEO strategy. The Microsite Masters keyword tool offers webmasters a detailed view of their site's performance and rankings for other sites according to your chosen keywords. The SEO Scoreboard function provides a view of the top performers for a given search term, while integration with Analytics and Clicky allow users to see which rankings lead to increased traffic and revenue.

#8: Kathryn Aragon chooses DropBox, Buffer and Asana

8. Kathryn Aragon, Award-winning Marketer, Author and Director of Content for Mirasee (formerly Firepole Marketing) favours Dropbox, Buffer and Asana:

DropBox

Dropbox is a hosting service that allows users to create folders on their computers, which are then synchronized, allowing others to access the same folder, regardless of which computer is being used to view it. Anything users add to Dropbox will automatically show up on all their computers, phones and even the Dropbox website – so they can instantly access it from any location. Dropbox also makes sharing and collaboration easier, by inviting other users to any folder in Dropbox.

Buffer

Buffer is a tool for collating and sharing online content through multiple social media channels. A simple, low-cost and user-friendly social media marketing tool, Buffer allows you to schedule posts across multiple channels, driving traffic and increasing engagement with target audiences. Features include:

- Content sharing: Share content easily across Twitter, Facebook, LinkedIn and Google+ accounts.
- Team members: Allow a co-worker to simultaneously manage your social media profiles through Buffer.
- Detailed analytics: Get analytics and insights on social content from aggregated statistics, comparisons and more.
- Scheduling: Schedule up to 100 posts to ensure you stay on top of sharing social content.

#9: Joel Widmer picks Alfred

Joel Widmer, founder of Dallas-based Fluxe Digital Marketing – a marketing shop that specializes in content marketing strategy and training for businesses opts for Mac OS X Productivity App, Alfred, for seamless integration between Mac and online content.

Award-winning Mac OS X app Alfred allows users to search your Mac and the web seamlessly, as well as controlling their Mac with the Powerpack, a function allowing customised actions such as application launching and file finding. Alfred prioritises results as you type, while hot-keys, keywords and customised search options help you claw back all that time spent trying to find a file. Users can also import community-created workflows to improve their productivity.

#10: Matthew Woodward selects Infusionsoft

Award-winning SEO and Affiliate Marketing Blogger, Matthew Woodward recommended all-in-one sales and marketing tool, Infusionsoft. Infusionsoft offers a subscription based all-in-one sales and marketing SaaS product for small businesses, with fewer than 25 employees. The integrated platform lets users manage their small business by pulling together data points related to sales, marketing, leads, payments, customers, and more. It includes products to streamline the customer lifecycle, customer relationship management, marketing automation, lead capture, and e-commerce.

Features include:

- CRM for Small Business: Organized contacts so users can get to know them better and speak directly to their needs.
- Marketing Automation: It helps streamline the way users market to new customers by automating lead capture and follow-up.
- Reports: Powerful reporting makes it easy to quickly assess what's working and what isn't.
- Online Selling: Setting up online shopping carts and managing online store, inventory, fulfillment and billing from a single system.
- Integration: There are hundreds of integrations in the Infusionsoft marketplace.

We received some great feedback on the must-have web apps in favor with SEO experts around the world, thank you to all those that took the time to respond!



“The best subscription companies in the world are not trying to push you something you don’t want. They’re not trying to sell you stuff at late night infomercials. They give you a service that actually changes your lives, right, that’s better than just receiving the product, that gives you the outcome without having to deal with hassles of asset management. These are the services that are changing your life.”

These words from Zuora CEO, Tien Tzu, in an interview with Jim Cramer of Mad Money, are an excellent endorsement of the value of SaaS and a reminder of the fact that the way businesses operate is being altered and improved on a daily basis by innovative, well-designed and carefully implemented SaaS solutions. Here are five such apps which have improved and altered the marketplace:

Slack – the SaaS app aiming to put an end to email

Described as an “email killer”, Slack aims to solve the problem of chaotic business communications caused by a lack of consistency and integration between varied digital platforms such as email, instant messaging, text message etc.

Slack focuses upon conversation channels, which can be specific to a department, project or office location. Any files or links uploaded on Slack, stay there, making locating a file or document far easier than struggling to remember whether you saved that document in an email or a file transfer link. Slack works across a variety of devices and offers adjustable notification settings, enabling users to stay as informed as they wish to, wherever they are. In their words: “More productive, more transparent, more efficient and no more email.”

Zuora – simplifying finances for subscription businesses

Now a major player in the SaaS marketplace, Zuora offers a comprehensive toolbox for running a subscription business. Zuora offers businesses the ability to price and package products in a meaningful way, through a range of tested pricing models – enabling a business to find the model which works best for them. Online account management enables businesses to access

financial data whenever they need to, enabling them to have informed conversations with their customers and stakeholders. A range of performance metrics is also available to keep the finance department happy. There can be no doubt that Zuora has made the process of running a SaaS business a great deal easier.

GitHub – enabling collaboration between developers

GitHub provides a centre for storing Git projects and networking with other developers. Git is an open-source version control system used for storing and keeping track of code modifications during development. Since its inception in 2008, GitHub has soared in popularity, now featuring 27.9 million repositories and gaining \$100 million of investment to date, as well as being included in CNBC’s Disruptor 50 in 2014 – a selection of companies whose innovations have revolutionised the way we live. Features include: integrated issue tracking, allowing developers to stay on top of bugs and fixes; pull requests which streamline and enable a collaborative process of discussing and managing changes to code; compatibility with 200 programming languages and integration with mobile devices.

SurveyMonkey – making market insight cheaper and simpler

Ruffling feathers in the sphere of market research and insight, SurveyMonkey offers an alternative to large and expensive market research projects, by allowing users to design and implement their own surveys; offering tools for each stage of the process. In designing a survey, users can purchase a targeted audience, choose from over 15 types of question and brand surveys with their logo and colours – mobile app compatibility is also available. At the analysis stage: real-time results, data analysis tools and SPSS integration are among a range of features which make this a real contender in the market research world and an invaluable tool for any business wishing to know more about their customer and the market in which they operate.

Zendesk – bringing businesses closer to their customers

Founded in Copenhagen in 2007, Zendesk now has over 60,000 paid subscriptions to its customer service and support ticket app. Zendesk is a ticket based customer service solution, which streamlines the process of dealing with customer questions and feedback. Starting with an initial customer question, Zendesk provides an easy to use platform for support agents, allowing them to highlight questions which require urgent attention and engage the necessary resources to answer that question. The app then tracks and keeps a record of all communications relating to that particular ticket and offers valuable performance data on metrics such as response time, to allow companies to compare their performance with that of their competitors. The app is designed to remove barriers to communication between businesses and their customers, bringing them closer together.

SaaS apps changing the business world

These companies and others like them are transforming the way we do business – discovering unexploited gaps in the marketplace and filling them with ingenious and effective SaaS solutions. The fact that many of these products are now an integral part of our lives is a testament to their success.