



White Papers and Articles

Practice Management - The Next Generation with Centerbase

Centerbase™ Review by Seth Rowland, Esq.

Who hasn't dreamed of going into space? Whether your preference tends toward quirky Dr. Who or idealistic Star Trek, the motivation is the same -- to break the bonds of your earthbound existence. Well, until Richard Branson starts discount flights to the moon, the closest you might be able to get to an untethered existence is Cloud Computing -- more specifically, Cloud Practice Management. So, come with me and let me introduce you to Practice Management: The Next Generation.

Lawyers have long used desktop matter management software to manage their billing, calendar, client relations, and documents to bring order and profits to their law firms. These systems, while mature and very powerful, have long had a major drawback; they are tethered to physical computer hardware which must reside in the office. They also require expensive maintenance and regular updates of both the hardware and the software.

With client expectations of 24 x 7 service, lawyers now need round-the-clock access to the information in their matter management systems. There has been a paradigm shift in recent years as lawyers have looked up to "the Cloud" for a solution.

The first step was to outsource the hardware and maintenance to "virtual desktops" hosted in the cloud ("DAAS") that used traditional desktop software delivered over the internet. These applications are robust, but they are not well suited for use on tablets and cell phones.

The Next Generation

Centerbase represents the "The Next Generation" of practice management software designed from the

ground up for use in the Cloud. Each firm gets their own matter management database which is hosted in the Cloud. Whether you use a desktop, laptop, tablet or phone, they all access the same live data. As a result, changes on any platform appear immediately, including design and layout changes.

There are both iPhone and Android apps that give you access to all your data. It took 1 minute to download and enter login credentials and I was ready to go. An admin module lets you customize the mobile options, including choosing which record types can be viewed in the app. For each record type (e.g. contact, matters and custom items) you can set how the list will be displayed and what form fields will appear.

The first generation of Cloud software was designed for the solo attorney. The systems were limited in their functionality to the core features of calendaring, time and billing, and contact management. They were cookie-cutter systems that anyone could learn and they sold like hotcakes. The hard stuff -- specialized workflow, advanced billing, form customization, reporting, and global search which were standard features of the desktop systems -- were not included.

Centerbase also represents the "Next Generation" of Cloud-based practice management software. They have tackled the "hard stuff" that users of desktop practice management have come to expect. With Centerbase, you can go to the Cloud without compromising your data integrity, your report requirements, or your complex partner profile allocation formulas. Centerbase has committed its development team to giving you the same features in the Cloud that you have come to expect from your

desktop software, and all at the competitive price of \$52/user per month.

Practice Area Customization and Workflow

Lawyers consider themselves specialists with special needs, and practice management requirements vary from lawyer to lawyer. The organizing theory behind Centerbase starts from this premise. Centerbase allows you to create unlimited custom items (or record types) and link them to other custom items, matters and contacts. And, on those matters, contacts and items, you can create unlimited custom fields. Custom fields include the full range of data types. For each item, you can have unlimited custom page layouts. You can change the layout depending on the type of case, the specific situation, or even the stage of the case in the workflow. Field creation is handled in an Item Manager which allows you to create, configure, and assign permissions to an item. Form layout is handled in a web-based Form Designer that allows you to layout fields in columns and rows, even allowing a field to span across multiple columns. The flexibility is infinite.

Centerbase then lets you use your data to trigger complex workflows. Rule-based workflows called "triggers" can monitor changes in fields, and launch emails, assign tasks, or create documents. When the assigned tasks are completed, the workflow can update fields back on the matter record allowing for seamless management of complex business processes. You can create user-activated workflows where the user can choose among branching options that launch particular items. Both triggers and workflows are managed through a web-based workflow designer. Workflows can include email and MS Word templates, allowing you to create custom documents on the fly and custom emails that include data from the actual matter.

Be prepared to spend some time planning out your workflow before you start building it or work with a Centerbase certified consultant. The editor is as complex, as it is powerful, but Centerbase needs to implement a better User Interface (UI) to make it more intuitive. For example, to set the value of a variable, you need to inspect the code on the HTML page to get the name of the field. And while you can create any new item on the fly and set its values, you cannot automatically set the page layout – it must be applied.

All the CRM Basics Included

In the best legal practice managements systems, the data radiates from two spindles -- contacts and

matters. The business generation side revolves around networks of contacts, their relations to each other, and their involvement with principals of the law firm. This is the classic CRM, short for Contacts Relations Management. Centerbase is both a CRM and a matter management system.

On the CRM side, cases enter the law firm via the CRM. With Centerbase you can place a potential client intake form on the firm's website and coordinate it with marketing and advertising campaigns. As the forms are completed, the data automatically enters the CRM, and notifies the appropriate person to follow up, schedule an appointment, gather prospect information, and then engage with the contact contractually. You can track emails, create phone logs (there is a VOIP connection that will auto-dial calls from web), send out engagement agreements, and collect retainer payments via credit cards. Because all record types in Centerbase are customizable, you can collect case-specific data via a web intake form. With automated triggers, you can even assign the intake to different people depending on how the questions are answered.

Centerbase takes a different tack than most programs in navigation, searching and list management. It uses a dynamic sidebar, similar to popular websites, that shows the results of search or customizable queries. The sidebar is a power navigational tool that is surprisingly efficient. For example, you can selectively tag the results of a search and perform a range of system-wide actions. As an advanced CRM, Centerbase allows you to save your searches, called queries, and assign them to a customizable menu hierarchy.

Other practice management systems use a more traditional grid format for search results. Recently, Centerbase added grids for some items. The Client grid includes billing related fields, summary data and action items. The Matter grid includes the ability to group data by field. I would like to see the ability to customize the columns displayed, including support for saved queries, and then be able to assign that configuration to a menu item and matter layout dropdown, similar to the page layout dropdown selector on the forms.

Plus all the Matter Management Fundamentals

Centerbase covers the fundamentals: calendar, tasks, notes and documents. The calendar event is fully functional, including the ability to assign an event to multiple users, provide advance email notifications of upcoming events, and to set both repeating events and

all-day events. On completion of any activity, you have the option to add a follow-up task and to record time. The time slip inherits the duration of the activities and the link to the matter. At the moment, though, neither the subject nor the description of the activity is transferred to the time slip. Expense slips have billing codes; but the codes were not enabled for time slips in my demo database.

Centerbase has a Related Items tab that houses all the related lists. The tab loads quickly. Each list includes the ability to add new items, link unassociated items, bulk-process options, and the ability to filter the list. It would be nice if the filter would include a search limited to the related items in the list. And it would be desirable if there were some more bulk process options comparable to the bulk process options on the sidebar lists.

Billing and Accounting

In order to do justice to the Centerbase billing, I have consulted my colleagues who are billing experts. These colleagues were impressed both by what has been built and released, and the early peek we got at the forthcoming accounting module. According to these billing specialists, Centerbase tracks a wealth of data on partner originations and fee allocation. It allows for setting a hierarchy of billing rates on the staff, the client, and the matter level. Bills can be generated on the Matter level, on the Client level, and in batch based on key indicators. Partial payments on invoices are allocated on the basis of configurable preferences.

The report center includes reports on billing, productivity, cash flow, origination, trust balance and accounting. The reports are comprehensive and dynamic, meaning you can drill down to the supporting data records directly from the reports.

The system ships with a report manager that allows you to create your own complex reports. You can duplicate an existing report as a starting point, and then customize the columns and the filters. For advanced report creation, you can register a SQL stored procedure with Centerbase and then use that procedure to build your report. There is currently no support for basic reports on standard and custom items. I am told, this is planned for a future "sprint". Centerbase runs monthly and quarterly software development sprints. If a feature is in demand, it will get prioritized.

Centerbase uses a single integrated database that handles both matter data and billing data. Fully

integrated accounting is a key feature of the Next Generation of practice management systems.

When the accounting module is released in January 2018, it will use the same database. This allows comprehensive reporting that includes matter data as well as billing data, and it allows workflows that blend billing actions with CRM actions.

API and Integrations

The goal of Centerbase is to anticipate the future needs of its customers. Being a next generation Cloud-based system, Centerbase uses APIs (application programming interfaces) to do much of the heavy lifting. These same APIs are available for integrating with other cloud-based programs. Centerbase recently released close bi-directional integration with Office365 calendars. Changes are instantaneous and don't require a desktop installation.

If you use Quickbooks Online (QBO) for managing your financial accounts, Centerbase has a one-way bridge to QBO. Client data is mapped to QBO clients. When an invoice is posted, the invoice and the line item detail are sent over to QBO. When a payment is received in Centerbase, the payment is sent to the appropriate account in QBO.

In addition, Centerbase has built integration with the NetDocuments document management system. Once the credentials are established, Centerbase will send over client and matter data to NetDocuments and auto-create the workspace which is then displayed as a tab on the matter record. I hope that future integration with NetDocuments will allow you to manage creation and approval of its document via the workflow engine.

The integration with credit card processing services Strip.com and LawPay.com means that invoices can get paid with a click of the button and automatically accounted for on the matter. The LawPay integration is particularly helpful for attorneys, as it allows a single payment to pay for WIP and for retained, with Centerbase automatically splitting the payments to the appropriate operating account and trust account.

TechnoScore

I hate this part of the review when it comes to giving a grade. As a consultant, I judge a product on whether it meets the needs of the law firm that retains me and fits within their budget. Part of the evaluation matrix includes a close look at current features versus present needs. Another key element is to examine the company's commitment to customer support and

continuing product development. I look at the development team's capability to bring the product to the next level, surprising me with features I didn't know I needed and now find I can't live without.

Centerbase is the first Cloud product that matches the capability of the current earth-bound desktop practice management systems. It deserves a high grade on comprehensive feature set and implementation. In my review, I have noted some features of the current system that I would like improved. I have raised a

number of these items with the company's management, and believe that in time, these issues will be addressed in future releases. Centerbase represents the next generation of practice management software, and it will surely go places no software company has gone before.

TechnoScore: LETTER GRADE (4.75/5.0)

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