Review: Rocket Matter (Web-Based Practice Management System)

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Rocket Matter
www.rocketmatter.com

TechnoScore: 4.0
1 = Lowest Possible Score;
5 = Highest Possible Score

After a year in beta, Rocket Matter has rocketed into the practice management world, offering law firms a Web-based system for managing their practice. But is all the hype justified? That's what we asked technology consultant and practice management specialist Seth Rowland, Esq. to find out. The result is a comprehensive review of Rocket Matter based on several months of use. Thinking of strapping your practice to Rocket Matter? Read Seth's review for all the details.

INTRODUCTION

The benefits of cloud-based computing are real and here to stay. The costs of properly configuring a file server, setting up one of the major practice management systems, providing training and configuration, and arranging for appropriate secure backup are substantial. In addition to hardware, the costs include software and consulting, as well as a major commitment of attorney and staff time.

Rocket Matter, a new Web-based practice management system that recently emerged from one year of beta testing, eliminates many of these costs. In exchange for a monthly fee of $39.99 to $59.99 per user, you can have a practice management system today, and

have your staff training and using it by tomorrow.

FIRST LOOKS AT ROCKET MATTER

My introduction to Rocket Matter came in the form of a one-hour walkthrough of the product — a personal Webinar. In that one hour, we setup an account, added users, configured preferences, created new matters, and added contacts. We went to the Rocket Matter dashboard and added tasks to my task list and scheduled activities.

Rocket Matter enables you to "bill as you work." Therefore, as I completed each task, Rocket Matter presented me with an opportunity to bill it. These time slips add up to more complete and accurate client bills.

All this was accomplished in one hour. However, I didn't realize the power of the system until I used it over a period of months. As I added more data, more clients, and more matters, the system seemed to come alive.

As I typed, Rocket Matter would present me options. Unlike other programs that present you options based on the first letters of the matching word, Rocket Matter uses what it calls "global intelligent search." Each data entry box presents you with a drop-down list based on any matching letters in the contact or matter name.

The effect is subtle, but over time the way I used the database changed. Rather than entering data in a particular unnatural way, say "lastname, first name," to ensure alphabetical sorting, I could enter

contacts and matters with more descriptive and accurate names. This small usability feature was indicative of the many pleasant surprises I found in the program.

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In discussions with Larry Port, founding partner of Rocket Matter, he stressed that Rocket Matter takes user-interface seriously. They have design specialists whose sole focus lies in improving the end-user experience. One look at the login screen and you realize that something is different. The clutter is gone. At the top of most screens is a single big search box — think Google. The search box will find any Contact or Matter in the system. As you finish typing or select the matching item, a Dashboard appears. The seeming magic in the design comes from an understanding of how lawyers use the system.

As you complete each task in Rocket Matter, count the number of keystrokes and mouse clicks. You will likely find a 50% or greater reduction over most desktop applications in the number of clicks it takes to accomplish any task. Such enhancements are available in other programs, such as Time Matters, with the understanding of keyboard shortcuts, or

the development of action triggers and custom power views.

PRACTICE BY THE DASHBOARD LIGHT

With Rocket Matter, one gets the sense that the program has anticipated your wish before you even formulated it and presented you with an option. Rocket Matter organizes information into dashboards. There is a matter dashboard, acontact dashboard, and a staff dashboard. Each gives you a different view of the information in your database for the respective perspective of you (the staff member), your client (the selected contact), or your matter (the selected case).

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The "rocket" metaphor is a key to understanding Rocket Matter. The Rocket Matter vision of the lawyer is one of action, the lawyer on the go, with his or her calendar and list of tasks.

The primary items you see on any dashboard are the action items. Lawyers meet with people and such meetings are billable. Lawyers assign tasks to themselves and their staff, and bill them on completion. Lawyers work on documents, profile them to a central server (think virtual backup and ubiquitous access), and then bill the document work on completion.

The matter profile is action-oriented. The intake merely asks you what is the billing arrangement and who are the players on the file. Rocket Matter supports notes and messages to file; even these are all billable.

The Rocket Matter vision of a lawyer is a billing machine. And why not? The best ROI (return on investment) for the monthly fee per user of $59 is billable time captured. The monthly fee represents 15 minutes of an attorney's time and 30 minutes of a secretary or paralegal's time. The dashboard makes this possible. Each item on the list has a bill link. Just in case you forget to bill, the link confronts you every time you open a dashboard.

But the dashboard offers more than billing. It is an effective tool for managing case information and displaying it. It enables you to see at a glance what still needs to be done on the case, when your appointments are, and what you have accomplished.

EXTENDED TOUR OF ROCKET MATTER
Adding Users

Setting up users begins with a statement: "I want to manage users." Click on the word "users" and a list of users appears. You can add, edit, or delete a user. No distinction is made in billing between attorneys and staff, which I find wise since some staff members are worth their weight in gold. You input enables you to profile the user, set a rate, and (you will like this) choose a color. Staff are color-coded on the calendars and lists. You also setup their login information.

Adding Contacts

Rocket Matter makes a distinction between individuals and companies. Again, I agree since it is often the company that is the client, and the individual that is the client contact or client billing contact. The structure of the form mirrors Outlook contacts. I did not see any import routines; it would be nice if you could import a vCard to populate the contact record or work with a CSV file.

Rocket Matter enables you to add multiple Tags to the record as a way to categorize the role played by the contact in any given matter. Given the integrated search, it is very easy to relate contacts to matters.

One very nice feature is that the company field on individuals has an automatic lookup to the company contacts, establishing a relationship between the individual and the company records.

Adding Matters

Creating a matter starts with a single question: "What is the client's name?" followed by one other: "What is the name of the matter?" And finally, what is the billing arrangement, the statute of limitations, and the people on the matter?

Upon completion, you are presented with a Matter Dashboard. You can see at a glance your ToDo's and your billable activity. With one click, you can see your document, your matter calendar, and your billing.

Adding Documents

Documents are defined broadly to include notes, Web addresses, and uploaded documents. As you add documents you can annotate them and bill them. The note box is a large memo filled with large font. For each, there is a separate box to add a billing description and time. The unit of time is left ambiguous. Most people use hours as the unit. But given the bill setup, it is possible to use a per diem or even a flat rate.

Managing Your Dashboard

The first item you see when you log into Rocket Matter is "My Dashboard." This is a calendar with a list

of today's events and any pending ToDo's. Both lists show any items that are linked to a matter.

The Create Event pulls up a "Calendar Invite" form that enables you to describe the event, assign a time, enter a client or matter, a location, and add notes. You can also assign multiple attendees and check their availability.

You can also easily add tasks, but tasks, unlike Events, cannot be linked to a matter from the Staff Dashboard. Moreover, tasks do not include a memo field where you can further describe the elements of the task.

The Calendar
The Calendar has functionality you would not expect in a Web application. The calendar interface is elegant and functional, especially given that it works entirely within a browser. You also have the ability to display the calendars of other users, with each user color-coded.

Timekeeping
Rocket Matter has a very clear view on billing — everything is billable. Every item, from tasks, to notes, to documents has a "bill" link or a bill checkbox. Billing is presumed to use the staff default rate, but you can override that.

In a nice touch, calendared items can be set up with multiple attendees, each of whom can be billed at the same time upon completion of the calendared event.

Billing and Receiving Payments
Rocket Matter enables you to generate invoices based on time entries and expense records. It also features general ledgers in which you can receive payments and apply them against the outstanding balance. You can export the bills to PDF or Excel. You can review the

slips. Accounting is presumed to occur outside of Rocket Matter.

If you work with a small group of attorneys, the ability to support group scheduling and staff-based billing are major pluses.

SOME AREAS OF IMPROVEMENT
Rocket Matter has made giant steps in user interface and multi-platform accessibility. They have captured ubiquitous billing and revenue capture. With the addition of documents, Rocket Matter enables online backup and access anywhere.

However, a few specific areas exist that warrant improvement.

Import/Export/Print
For now, Rocket Matter has some exporting routines. You can, for example, export the contact list and the matter list as a CSV (comma separated values list) file. You can then independently create merge templates in Word and use the CSV file as a data source. However, the problem is two-fold.

First, there isn't much data worth exporting. Contacts are essentially a collection of names, addresses, phone numbers, and emails; matters are merely a billing profile.

Second, developing merge templates isn't exactly advanced automation or particularly easy for most users. Nor is there any formalized import routine for data.

The print function depends on your browser, rather than a separate print style sheet, the latter of which is relatively easy to implement.

Notes and Billing Notes
The note fields are everywhere. They are large boxes that enable you to enter text in large readable fonts. Each event and note includes a separate memo box called billing notes. Strangely, however, there is no note or billing note box for tasks. I think lawyers would welcome a description of how they completed a task and a corresponding billing record.

Nor is there a way to link notes or documents to a contact independent of a particular matter or the ability to display the text of notes without opening each individual note record.

Global Search
The internal search engine appears limited to selecting matters and contacts. There simply is no search at the present time. This is a major omission. You cannot search events, tasks, notes or documents, or notes on matters and contacts. What this means is that you cannot "find" that thread in which you discussed a particular topic with a client, or your notes on a particular search issue.

Customizable Fields
If you are looking to add custom fields on contacts or matters, you will have to wait for future releases. You can add relationship categories and tags (one word descriptions), but everything else is fixed.

If Rocket Matter is to fit into workflow and automation solutions, it will need customizable fields, adjusted by practice area. If and when Rocket Matter combines this with "client access" to their own record, it will have enabled Web-based data intake forms, reducing the burden of data entry on the lawyer and increasing the accuracy of data intake.

Offline Access
A prime benefit of cloud-based computing is access anywhere, anytime.

The reality is that anytime is really "most of the time." Sometimes you don't have an Internet connection — you're traveling or your ISP has let you down. For those times, offline access means that you can keep working and when your connection resumes, those "offline changes" will synchronize with your hosted database.

Microsoft has an "offline mode" for Internet Explorer and Windows Explorer. Designated file folders and Web pages are cached locally on your computer and editable when you are not connected to a network. When you reconnect, the changes are synchronized.

NetDocuments is an online document management system. But it has an option to cache your documents and indexes locally on your own server for access when the Web connection to NetDocuments is unavailable.

Rocket Matter would benefit from a feature that would allay attorney "separation anxiety." A side benefit of an offline mode, or local cache of data, would be that such data would be available to desktop programs like Word and HotDocs for document automation.

CONCLUSION
If your vision of practice management is still rooted in your Outlook calendar and Microsoft Excel, you owe it to yourself to look at Rocket Matter. The product is easy and accessible and will represent a major improvement over what you currently have.

If you work with a small group of attorneys, the ability to support group scheduling and staff-based billing are major pluses. Moreover, the captured billables will pay for the monthly cost many times over. From that perspective, I would rate the program 4 out of 5.

If, instead, you have a specialized practice with need for workflow, custom intake forms, and document automation, I would advise you to wait for future releases.

ROCKET MATTER'S RESPONSE
We invited Rocket Matter to respond to this TechnoFeature. Larry Port responded as follows:

Dear Seth & TechnoLawyer:

Thank you for your excellent review of Rocket Matter! This was a very comprehensive look at Rocket Matter and we appreciate the time you took to evaluate our product. We feel you really understood the design decisions we made on a deep level. Rocket Matter is relatively new: We launched as a beta product in February 2008 and as a 1.0 prod- *uct in January 2009. We continually update our Rocket Matter with exciting new features. Since Rocket Matter is a Web product, these updates occur automatically for our users. To address some specific points in the review:*

• Billing note fields for tasks: We are currently in the process of a complete redesign of our to-dos. They will become more robust tasks with billing note boxes to allow for greater detail.

• Global Intelligent Search: Right now our search is limited to contacts, matters, and tags. We believe the broader search is, the more difficult it can be to find results. However, by leveraging our tagging functionality, most items in Rocket Matter can easily be discovered.

• Customizable Fields: Soon we'll be rolling out tagging for matters, which will allow arbitrary information to be stored for every case you're working on. This information will also be searchable. In addition, many customers utilize our Related Contacts fields to store custom form information.

We appreciate reviews like this as it gives us very valuable feedback as we move forward. Thanks!

Seth Rowland, Esq. was named TechnoLawyer Consultant of the Year in 2002 for his contributions to TechnoLawyer on the subject of document assembly and law practice automation. He is a nationally known technologist whose company, Basha Systems, has helped many law firms build customized practice management and workflow solutions. Please feel free to visit his blog for the latest on document assembly and practice management. Basha Systems currently offers consulting services in Time Matters, HotDocs, and Amicus Attorney.

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