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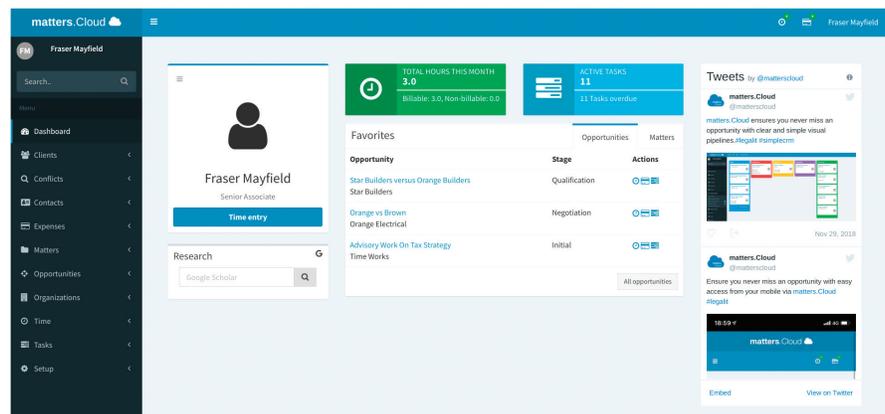
matters.Cloud

Practice Management Software That Spans the Entire Client Lifecycle

By Neil J. Squillante

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Remember when you were a young lawyer and wondered where clients come from? Eventually, your boss sits you down, tells you about the facts of life, and asks you to pitch in with rainmaking efforts. Most practice management systems don't accommodate this aspect of your legal career, but one company seeks to change this.



The matters.Cloud Dashboard lists your most important matters, opportunities, and more.

matters.Cloud in One Sentence

[matters.Cloud](#) is a practice management system that covers the entire lifecycle of your clients, including prior to engagement when they're prospects.

The Killer Feature

Typically, practice management systems use a new client or matter the starting point for data collection. This skips the critical marketing and sales phase during which prospects

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contact you. matters.Cloud includes this initial phase, eliminating the need for separate customer relationship management (CRM) or intake software.

You enter organizations as you see fit. You can then add notes and tasks to help you close the deal. Assign tasks to colleagues and add other details such as contacts, addresses, etc. as you obtain more information. At this stage, there's no “matter” so instead you create an “opportunity” — a term of art in CRM software that means a potential sale. You can track time spent on opportunities to analyze your rainmaking activities. Make your most important opportunities “Favorites” for fast access from the Dashboard.

matters.Cloud recently added a visual pipeline much like you would find in CRM products

to better visualize your sales process. The pipeline functions like a Kanban board in which you move opportunities through each stage. To assist your sales outreach, matters.Cloud integrates with Mailchimp for email marketing.

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Other Notable Features

The Dashboard in matters.Cloud befits the modern era with a Google Scholar search box and your favorite Twitter feeds alongside your most relevant matters and opportunities, monthly billable hours, upcoming and overdue tasks, and the time entry tool. matters.Cloud integrates with the popular writing service Grammarly to ensure clear and concise time entries.

The calendar in matters.Cloud shows your time entries for each day. Days without any time display the time entry tool for quick input.

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The matters.Cloud mobile app for Android and iOS also helps you stay up-to-date on time tracking, including the ability to initiate a call from the app and have the time recorded. “The mobile app has all the same functionality as the desktop web app,” says Mayfield.

Given its emphasis on the entire client lifecycle, matters.Cloud offers conflict checking via its global search. Just as importantly, you can track all contacts associated with your matters and their relationship — opposing counsel, parties, service providers, etc. You can also create custom fields to track anything else of importance. Everyone with whom you’ve ever dealt will arise in your conflict searches.

What Else Should You Know?

Whether it’s your state bar or GDPR, matters.Cloud enables you to comply with any applicable data privacy regulations. Thanks to matters.Cloud being built on Google Cloud, you can choose to store your data in the United States, Australia, Europe, or India. The company isolates your database and encrypts all data at rest and in transit. matters.Cloud costs \$25 per month per user.



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Neil J. Squillante is the founder and publisher of TechnoLawyer, an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer the only email subscription they need. Previously, Neil practiced commercial litigation at Am Law 100 firm Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University.

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