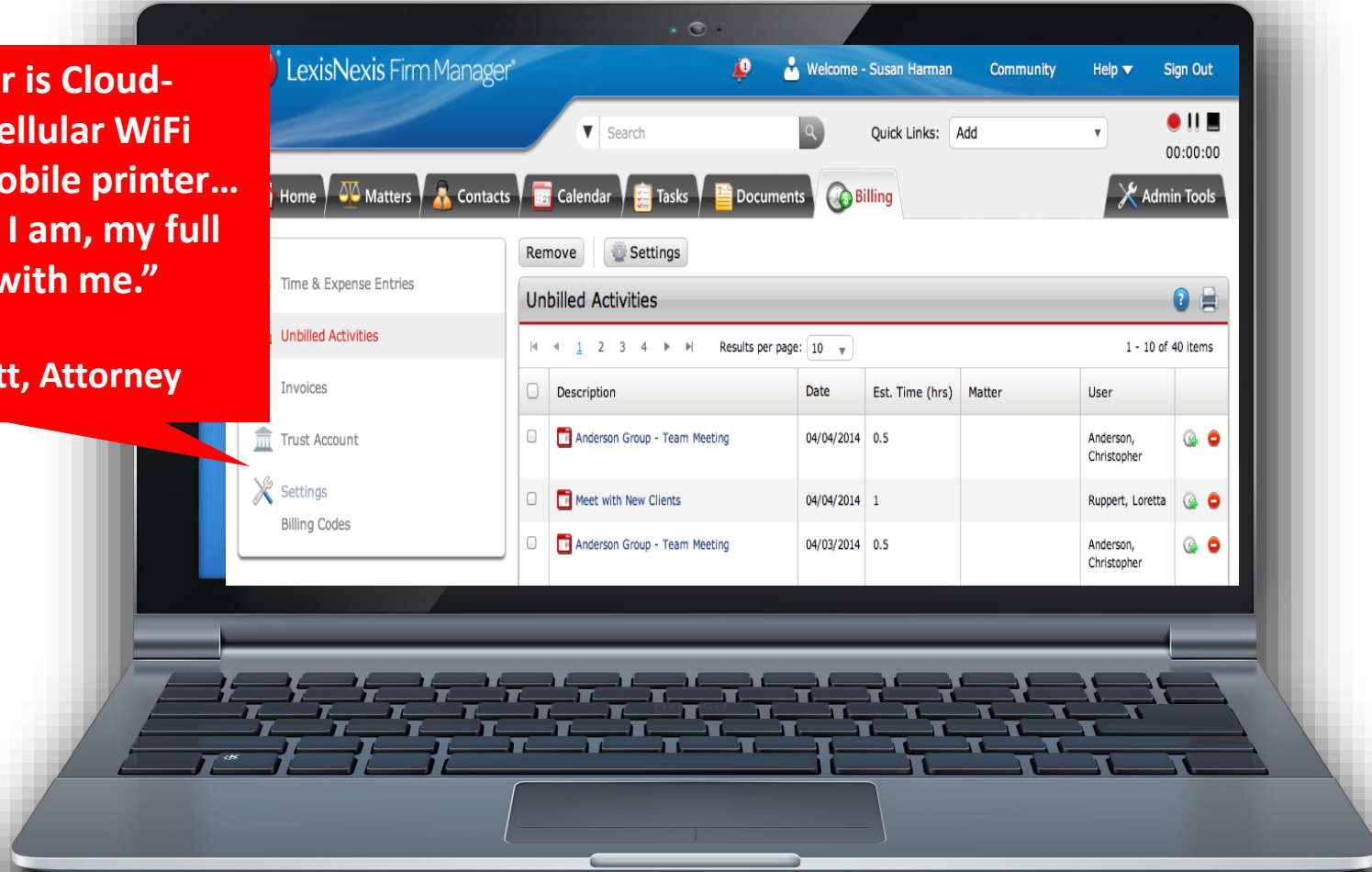


# LexisNexis Firm Manager: Helping Solo/Duos Operate more Efficiently & Effectively

Firm Manager is a micro law (1-3 attorney) SaaS practice management application; it is also a platform for future practice management applications.

**“Since Firm Manager is Cloud-based...with just a cellular WiFi connection and a mobile printer... I find that wherever I am, my full office is right there with me.”**

**-- Douglas William Vitt, Attorney**



# The Customer Problem We Solve

 LexisNexis Firm Manager®

The power of independents.

Introducing the  
**ALL-NEW**  
LexisNexis Firm Manager®,  
the innovative online  
practice management  
solution for the  
independent attorney.



**Enables the independent attorney to have more time to practice law**

- They need help managing clients, contacts, matters & billings.
- Missing court dates or to-dos for clients is a big problem.
- They are spending too much time tracking down documents, calendar items, case related information.

*“Enables attorneys to be the lawyer they dreamed they would be.”*

*“Helps attorneys to build a law firm that has value to them  
and those that count on them”*



**Andrew**  
**Early Innovator Solo Attorney**

*“You have to know how to delegate and make things happen!”*

**Needs & Motivations**

- Highly motivated to make money
- Trying to keep as much of the office online as possible
- Delegates the tasks that he feels comfortable delegating
- Wants to stay busy and keep the business profitable

**How is he different from other personas?**

- He views himself as a business man / entrepreneur AND an attorney
- Technology allows him to compete with larger firms
- He's been through the ringers & has a mature firm



**Alex**  
**Early Majority Solo Attorney**

*“It is difficult to keep business and personal lives separate. There is a lot to take care of.”*

**Needs & Motivations**

- **Very organized and likes to keep things straight**
- **Keeps calendars on desktop, desk, and phone so that nothing is missed**
- **Likes helping people and feeling fulfilled**
- **Tries to attend ABA events and keep up with the latest statutes**

**How is he different from other personas?**

- **Highly confident in his legal abilities, he views himself as a specialist, with a "focused" practice, which adds to his perceived value in the market**
- **He likes a challenge, and farms out work he likes less to others**
- **He's built a good reputation and can often pick and choose cases.**



**Nancy**  
**Late Majority Solo Attorney**

*“There is so much to keep track of... so many bills and have to pay for so many services – it’s overwhelming and easy to get lost.”*

**Needs & Motivations**

- **Needs to find files and documents quickly**
- **Difficult to find time to follow up with issues**
- **Needs to be able to know the status of all active and pending matters**
- **“I just need something that will keep my head on straight that is not too expensive.”**

**How is he different from other personas?**

- **She is worries a lot about cash flow. She either does without spending on ancillary items, or takes on clients/matters she doesn't necessarily care for**
- **She may spend comparatively more time at court which leaves her other matters unattended**



**Andrew**  
**Early Innovator Solo Attorney**

**Pain**

- I want to be completely automated. I've set up so I don't need 4-5 secretaries. Where possible, for instance, I have customers enter data at home. Automation is my leverage - I can't compete against larger firms without it
- I delegate work to others in my firm because it frees me up to do what I like best: Interview people, and go to court
- As the leader, I need to pursue business and generate cashflow. My bookkeeper kicks me in the butt when I need to know which clients aren't paying me
- I delegate things to one junior partner and two paralegals. I need to keep track and see activities are being done on delegated tasks.



**Alex**  
**Early Majority Solo Attorney**

**Pain**

- **I want to focus my practice on the 2 - 3 areas I really want to focus on. I want to spend less time on the more general matters that anyone can do, although there are always a few cases we'd be stupid to turn away. Other attorneys do general practice area matters, but I do the special/weird ones, where it's more difficult to figure out. I like work that leverages me well. I'd rather practice law, the advanced stuff**
- **I couldn't sleep at night because I'm constantly thinking of stuff and stress. I'd wake up in the middle of the night and think "Don't forget this!" I have reminders all over my calendar in Outlook, and look at it 40,000 times a day.**
- **I do 20 things at once, all day, every day. I can't operate if I'm not organized. I'm on the phone and in email all day**
- **I had a great office administrator, but she moved and I didn't step in. I wasn't managing - I have no managing skills. I had no controls or productivity measures. So in June I restructured and laid off staff. People weren't working to capacity**



**Nancy**  
**Late Majority Solo Attorney**

**Pain**

- I spend a fair amount of time here doing things that aren't putting the business forward. I don't have a husband and I don't have children, so I spend more time here than I do at home. And that's okay with me, it doesn't make me miserable. I must say I'm working harder than I'd thought I would, spending more time on this [practice] than I thought I would, given my 20 years and the ratio of income to man-hours.
- I try to see how effective toner cartridges are, prints per printer cartridge, so I know how many copies I get per cartridge
- Sometimes I think on meeting a client that it will be more expensive or complex than they expect. I'll quote them a higher retainer, say \$10,000. If they can come up with it, that tells me something. If a client is referred from a trusted sources I may quote a much lower retainer, say \$2500 - \$3000. I will know quickly if they won't pay
- Tracking prospects/client calls, managing incoming leads, and making sure they are passed on to the most relevant attorney. People go to other attorneys because we haven't responded in time

# LexisNexis Firm Manager® Target Customer

## The Target Customer: the solo/duo; independent attorney



*“It is difficult to keep business and personal lives separate. There is a lot to take care of.”*

### Needs & Motivations

- Very organized and likes to keep things straight
- Keeps calendars on desktop, desk, and phone so that nothing is missed
- Likes helping people and feeling fulfilled

### What’s she like?

- Highly confident in her legal abilities, views herself as a specialist, with a "focused" practice, which adds to her perceived value in the market
- Likes a challenge, and farms out work likes less to others
- Built a good reputation and can often pick and choose cases.

### Pain

- I want to focus my practice on the 2 - 3 areas I really want to focus on.
- I couldn't sleep at night because I'm constantly thinking of stuff and stress. I'd wake up in the middle of the night and think "Don't forget this!" I have reminders all over my calendar in Outlook, and look at it 40,000 times a day.
- I do 20 things at once, all day, every day. I can't operate if I'm not organized. I'm on the phone and in email all day

# LexisNexis Firm Manager<sup>®</sup> Actual User



## Meet John: Solo attorney

*“I’m a solo attorney. I live and die by the use of my time. I make a living being an attorney, not spending time on admin tasks. I need a solution that’s simple, intuitive, and gives me everything I need to run the business at my fingertips.”*

### Needs & Motivations

- Doesn’t want to miss something, nothing can “fall through the cracks.”
- Wants to be mobile, needs the info available on his phone, desktop, and tablet.
- Loves being a solo, but always wants to keep his options open.
- Likes helping people and feeling fulfilled.

### What’s he like?

- Builds client relationships on adding value to their businesses or lives.
- Focused on growing the practice and looking for opportunities.

### Pain

- **I often** worry that I’ve missed something, overlooked a deadline, or forgot to follow-up.
- **Don’t make me do something twice – that’s a waste of my time and your money.**
- **Love technology, but hate complexity. Show me a simple solution to a complex problem and I’m sold.**

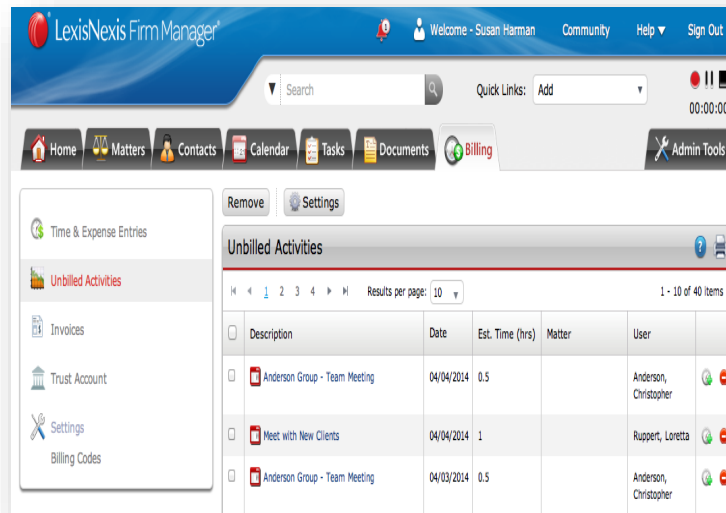
# Case study: small law

- **Situation:** I do 20 things at once and have files scattered everywhere. I spend too much time tracking down case related information. I worry that this will result in potential serious consequences: missed court dates or to-dos for client, bar complaints for not returning client calls, and up to 40% loss in billable hour revenue for inaccurate time and expense tracking.

## Key Issues

- Control the business of practicing law: bill and invoice, organize client and matter information, track time and expenses.
- Access calendar and files when away from the office.
- Respond to clients quickly; anytime, anywhere.

## Solution Firm Manager



The screenshot shows the LexisNexis Firm Manager interface. At the top, there is a navigation bar with 'Home', 'Matters', 'Contacts', 'Calendar', 'Tasks', 'Documents', 'Billing', and 'Admin Tools'. Below this is a search bar and a 'Quick Links' dropdown. The main content area is titled 'Unbilled Activities' and contains a table with the following data:

Description	Date	Est. Time (hrs)	Matter	User
Anderson Group - Team Meeting	04/04/2014	0.5		Anderson, Christopher
Meet with New Clients	04/04/2014	1		Ruppert, Loretta
Anderson Group - Team Meeting	04/03/2014	0.5		Anderson, Christopher

## Benefits

- Provides comprehensive view of matter related information - all in one place.
- Finds unbilled time and expenses.
- Enables anywhere, anytime access to the firm's and clients' information; securely, reliably, ubiquitously.

- **Impact:** "Since Firm Manager is Cloud-based, with just a cellular WiFi connection and a mobile printer I find that wherever I am, my full office is right there with me. And finding 30 minutes per week of unbilled activities can make a big difference to my financial situation."