

CARET Legal

Family Law Firm Excels When Equipped with the Right Tools

FIRM

Wright Law, LLC

LOCATION

Jackson Hole, Wyoming

PRACTICE AREAS

Family Law, specifically guardian
ad litem services

SWITCHED FROM

Clio

Small firms need efficient and cost-effective law practice management software, acknowledges Rebecca Wright, the principal of Wright Law in Jackson Hole, Wyoming. "Anything that can improve my efficiency and productivity gets my attention."

Since 2017, Wright Law has been a boutique law firm providing guardian ad litem services to Wyoming families. The firm also assists clients in related legal areas, including divorce, establishing custody and visitation, paternity actions, child support, custody modifications, adoption, guardianships, surrogacy, mediation services and more.

Wright, with a degree in business management and a Juris Doctor from the University of Wyoming, keys into cost-benefit analyses when choosing software to manage client services.

Although she started using a popular online law practice management platform, it did not meet her requirements for efficiency. Her previous system lacked advanced billing features, such as split billing for multiclient matters. As a result, Wright spent excessive time on billing, taking her away from practicing law and high-value, billable work.

When Wright found that CARET Legal supported split billing, she investigated the company's integrated software as a service offering. The company's vision aligned with her own: firms excel when equipped with the right tools.

The Right Tools: CARET Legal

CARET Legal is an end-to-end, SaaS law practice management platform which provides legal solutions for various law practices, including civil litigation and family law. It supports customer relationship management to track prospects and intake prospective clients, matter management capabilities and sophisticated accounting, billing and timekeeping tools.

“

I spend three to four hours on billing issues every month, amounting to more than \$1,000 in billable time. If CARET Legal can save me even a percentage of that time, my investment pays for itself in less than a year.

— REBECCA S. WRIGHT, WRIGHT LAW, LLC

CARET Legal has more than 11 ways to create time entries. Users can save multiple timers and restart them on demand upon completing or switching tasks. Firms can also assign split billing percentages, fees and expenses and generate custom invoices to review, edit and send. The system can generate advanced reports showing real-time visibility for matters and revenue across practice areas without integrating with third-party applications.

Ninety percent of Wright’s cases focus on guardian ad litem services involving children in custody and visitation disputes. “There are all kinds of nuanced problems and due process issues when you represent children in divorce cases,” says Wright, whose niche firm has no staff. Wright uses a receptionist service and handles all the firm’s bookkeeping. So efficient, cost-effective tools are critical to her work.

Wright generally has one matter with two parents, who are both responsible for the invoice. Still, “one or the other parent may not be able to pay or pay on time,” explains Wright. Then she must record which parent is charged interest, which is paying on time, and keep an account of when one parent adds more to the trust account than another. “Trying to keep track of all of this without split billing is time-consuming and painful,” describes Wright.

CARET Legal’s split billing feature allows Wright to divide an invoiced amount for services and expenses on a single matter between multiple clients. She can set different rates and split percentages for fees and costs among each client.

Once Wright configures split billing for a matter, she can generate invoices without spending excessive time. Using configured percentages, CARET Legal’s billing tool can generate unique invoices for each client. But the efficiencies do not stop with billing. Wright has found CARET Legal has many more features to help her organize data and keep the firm running smoothly and profitably.

Wired for Organization and Efficiency

As a solo practitioner, Wright’s ability to organize is critical to the firm’s productivity. When she migrated data to CARET Legal, the company’s onboarding team dedicated itself to making the transition smooth and efficient. “When I submit a help-desk ticket, someone gets back to me quickly, and they’re on the spot to set up a screen-share on demand,” says Wright.



CARET Legal has a lot of efficiencies and is wired to be organized.

— REBECCA S. WRIGHT, WRIGHT LAW, LLC

Wright found CARET Legal’s user interface intuitive and user-friendly. For example, users can create new contact entries by replicating existing contact information. The contact feature is helpful for law firms with multiple family members in the same household requiring their own contact records.

CARET Legal also supports granular reporting and allows the subdivision of accounts to report expense subaccounts and granular income statements.

What should firms know about CARET Legal?

CARET Legal values security. “My clients trust me with their most important data,” shares Wright. “As a steward of client data, knowing CARET Legal will keep my practice safe and secure 24/7/365 is essential.” CARET Legal uses advanced encryption for data at rest and in transit. The online services undergo security audits from internal security experts and external companies and undertake various security measures to prevent unauthorized access to data. In fact, CARET Legal is the first cloud-based, end-to-end legal practice management platform to achieve SOC 2 compliance and is hosted on Amazon Web Services with redundant data and applications to ensure your data access is uninterrupted.

Would you recommend CARET Legal to other firms, and why?

“Yes—100% for all the above reasons. CARET Legal goes above and beyond to ensure I maximize my experience effectively.”

What advice would you give other firms considering switching to CARET Legal?

“Anything worth having is worth waiting for. Don’t let the process of migrating to a new system dissuade you from taking advantage of the efficiency gains offered by the software.”



**REBECCA S. WRIGHT,
FAMILY LAW ATTORNEY**

