

Streamlined estate planning with Matter365

See how The Worthington Law Firm was able to automate matter creation, optimize estate planning workflows, and manage their practice from a single pane of glass



Overview

Jim needed a simple, light-weight way to manage his practice all in one place. He had tried a number of cloud-based Legal Practice management solutions. But they often created more of a mess than when he started. He already pretty much lives in Microsoft 365 apps, so he decided to look for a solution built directly on office365.

After an easy transition from RocketMatter to Matter365, The Worthington Law Firm:



Saves hours on the creation of each new Matter and the dedicated spaces to store the Matter's data



Retains control and ownership of all of their own client files and data in their Microsoft environment



Has real time visibility into their billing and WIP data through a single pane of glass

Out with the old and in with the new

After years of practicing law for a big firm, Jim Worthington decided to break out on his own in 2010. He launched The Worthington Law Firm to help people navigate the high-stakes choices they face in planning for their family's future. His mission is to ensure his clients make educated, thoughtful decisions, while he handles the complexities in estate planning.

“I spent two years not knowing how much I made; I still think I over-paid taxes those years”

After expanding his practice to cover both Kentucky and North Carolina, Jim knew he needed a flexible, cloud solution to enable him to better manage his distributed team while continuing to build a lean law firm. He was a life-long Microsoft user and wanted to find a way to best leverage the full suite of Microsoft tools he already used on a daily basis. So, after a few years bouncing between RocketMatter and Clio, Jim decided it was time to try something better.

Fast forward a quick two months, and The Worthington Law Firm was up and running on Matter365's fully-integrated practice management solution, saving hours on manual, repetitive work.

In their new lightweight environment, Worthington Law Firm has eliminated double – data entry from their workflows, has an easy way to track each Matter's tasks, and benefits from real-time visibility across all matter and financial records.

“A client can contact me on a Friday afternoon before a surgery on Monday, and I can get everything executed, with the filing and bookkeeping completed before the Surgery first thing on Monday.

And that thrills me”

Building a distributed, agile law practice

The evolution of The Worthington Law Firm

Jim Worthington has always considered himself an “early adopter.” And while The Worthington Law Firm went paperless years ago, they are proud to be an entirely cloud-based, distributed firm, without sacrificing anything in the way of privacy.

“It's actually a big selling point for me with my clients. I just tell them that 'they can rest easy knowing that their data is safe and secure in this little company called Microsoft,' and they love that.”

With Matter365 having automated away much of the repetitive, administrative tasks that can hamper firm productivity, The Worthington Law firm has been putting their time savings to use, helping more clients navigate the complexities of estate planning

Key benefits of integrated matter management with Matter365



A dedicated place to save all the documents (OneDrive and OneNote)



Collaborative client communications (shared Outlook Inbox for each Matter)



The use of templated workflows for each Matter type (Planner)



Integrated time tracking (across all of your microsoft apps)

“It did automatically a bunch of things that I was already doing. It was if it was made for me”

Ready to spend more time delivering value to your clients and less on repetitive non-billable administrative work?



**Sign up for a trial with
Matter365 today**