A Guide To The Best Legal Matter Management Software in 2025

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What skills do you think a solicitor needs to succeed? Attention to detail? Of course. A strong work ethic? That's a given. What about being well-organised?

For law firms and legal professionals, staying organised is essential. So, how can solicitors and legal teams stay organised at all times and boost overall efficiency? The answer is surprisingly simple: legal matter management software.

Legal matter management systems enable lawyers, paralegals, and law firm staff to store documents in one location, organised by case, and access them from anywhere, at any time, ensuring complete legal compliance and security.

This article explores what legal matter management systems are, uncovers their benefits for law firms, and discusses which legal matter management software is right for which firms. We'll also highlight why Clio stands out as a leader in this sector.

What is a legal matter management system?

A legal matter management system is a software or web-based application that streamlines legal workflows and increases productivity across law firms. Legal matter management systems optimise document management, calendaring and scheduling, case research, billing and invoicing, and communication and collaboration, among other benefits. Clio Manage, for example, is designed specifically to support the needs of legal practices of all sizes in the UK, providing an all-in-one solution that covers every aspect of legal casework, compliance, and client collaboration.

The benefits of legal matter management software for law firms

Legal matter management software helps solicitors and law firm teams stay organised and productive, providing a single source of truth for every aspect of a firm's operations. Let's now dig into the specific benefits legal matter management software provides.

Access to the information you need

Centralisation makes compliance and productivity simple for law firms. And simplicity fuels performance.

With legal matter management software like Clio, lawyers and legal staff can access all case details from a central portal. Clio's practice management software ensures all case files, contacts, notes, and key dates are organised securely in one location and accessible from anywhere, even remotely. No more lost files or navigating multiple, disjointed apps. .

With Clio's robust integrations, including Microsoft Outlook 365, Dropbox, GSuite, and more, firms can create a true all-in-one system. Clio's document management keeps sensitive legal documents compliant with UK standards (including GDPR and SRA), so you can have complete confidence in your firm's data security and regulatory compliance.

Handling everything from client intake and onboarding to billing, payments, and secure communications in one platform boosts productivity and reduces errors for legal firms, ensuring that nothing important ever slips through the cracks.

Plus, legal matter management software boosts your clients' experience. This seamless workflow also drives a superior client experience, giving clients a transparent and professional interaction from start to finish. Clio's client portal enables secure document sharing and communications, eliminating uncertainty and reducing stress for your clients.

Keep your team on the same page

All-in-one legal matter management software keeps teams aligned. This is vitally important, especially in the era of remote and hybrid work environments.

Our *Legal Trends Report* found that only 30% of lawyers now work exclusively from the office. While increased flexibility is a blessing in some respects (less time spent commuting, better work-life balance, and so on), it can complicate team-wide collaboration.

Well, unless you use legal matter management software.

Clio's cloud-based platform guarantees all your solicitors, paralegals, and staff stay connected and updated in real time. Document collaboration, calendaring for court dates, automated reminders, and role-based access mean that even the most distributed teams can operate as one.

Reduce redundancies

According to the *Legal Trends Report*, lawyers bill just 33% of their time (2.6 hours per day). So, where does the rest of their time go?

Administrative tasks like document drafting take up far more time than necessary, while toggling back and forth between programs is another unnecessary distraction. Harvard Business Review research finds employees spend roughly 9% of their time at work switching between apps and reorienting themselves.

Legal workflow automation via centralised legal matter management software is the perfect solution. Manage every single one of your firm's processes in one place. Automate client onboarding workflows, communication, deadline reminders, and document creation.

The Legal Trends Report explains that firms that invest more in software and marketing have utilisation rates above the industry average of 37%, which amounts to just under three billable hours per day, and they also earn much higher profit margins.

Reduce redundancies and spend more time on what truly matters: your clients' cases.

Which legal matter management software is right for me?

Given its wide-ranging benefits, it should come as no surprise to learn that there are multiple legal matter management software programs to choose from. Each has its own advantages, disadvantages, and target audience. Plan on switching to a new legal practice management software?

Below, we summarise some of the leading legal matter management tools currently on the market.

Clio

Clio is the world's leading case management software. With it, you can link documents, contacts, calendar events, time entries, and invoices to each case. By integrating crucial case information, Clio Manage ensures your law firm meets the highest standards for case and matter management, organising everything securely and accessibly, in line with UK regulatory requirements. This solution also now features Matter Stages, visual work-in-progress boards designed to help give you greater insights, improved oversight and better collaboration across the case lifecycle, firm-wide.

Additionally, with matter templates in Clio, you can create easy-to-use templates with preset information based on your firm's needs, such as your practice area or case type. Not only will you save time, but you'll also improve the consistency and accuracy of information across all of your cases.

Key features of Clio Manage for law firms include:

- Case and matter management: Organise case files, notes, and contacts centrally.
- Document management: Store, share, and organise legal documents with full UK GDPR and SRA compliance.
- Time and expense recording: Easily track billable hours and associated expenses.
- Legal calendaring: Manage deadlines, court dates, and set automated reminders.
- Billing and invoicing: Automate billing cycles and simplify payment collection.
- Client portal: Secure client communications and document exchange.
- Performance dashboard: Real-time insights into firm performance, billing, and collections.
- Integrations: Seamlessly connect with major legal tech apps like Outlook, GSuite, Dropbox, Xero, QuickBooks, and Microsoft Teams for smooth workflows.
- Compliance: Built-in features to support UK GDPR and SRA standards.

Clio's unique selling points are:

- It's a true **all-in-one system**
- It boasts **100+ integrations**
- Clio's platform is recommended by The Law Society of England and Wales and approved by the Law Society of Scotland, reflecting its suitability and trust within the legal profession.
- It has **an online payment system** (Clio Payments), allowing firms to offer client-centric payment options (such as flexible instalment plans).

To learn more about Clio's benefits, check out how law firms use Clio to boost efficiency and client satisfaction.

Unfortunately, one downside is that Clio Payments (and some integrations) are currently only available in certain countries.

MyCase

MyCase offers a host of legal matter management capabilities, covering everything from lead management to billing and payments.

On the plus side, MyCase offers a wide range of billing options: hourly, contingency, flat fee, and pro bono. This is particularly important given that today's clients want flexibility over payments, according to the *Legal Trends Report*. Users can also use the batch billing feature to save time with invoice creation.

On the downside, however, the practice management and payments management sections are split into two different platforms. This eliminates the potential efficiency gains firms would derive from implementing a true all-in-one legal matter management software.

MyCase also boasts a fairly small list of available third-party integrations and its processing fees are not as simple and transparent as other options.

PracticePanther

PracticePanther is great for automatic time and expense tracking, helping firms make this process as efficient and painless as possible. Its easy-to-use interface means you can get up and running in no time, with minimal (if any) training required.

That said, its automation capabilities are fairly limited. It can automate time tracking but can't apply this to the client onboarding process. PracticePanther also offers fewer than 30 integrations, and many of its most useful features (like flat-fee billing) are reserved for the top-tier business plan.

Smokeball

Smokeball—a "hybrid cloud" solution—features automated time-tracking that even tracks time spent on other apps (such as Word or Outlook). What's more, it integrates directly with solutions like LawPay and QuickBooks to increase productivity and reduce errors in the billing process.

However, as it's not truly cloud-based, lawyers can't access the platform's full capabilities while on the road. This is a major stumbling block for busy solicitors who often spend their days outside the office.

CosmoLex

CosmoLex features on-the-go time tracking and integrated accounting, eliminating the need for duplicated data entry. Plus, its Money Finder feature ensures users capture billable work that hasn't been invoiced, increasing firms' utilisation rates.

Unfortunately, the platform has its downsides. It only offers limited integrations with third-party apps and follows a rigid, inflexible pricing model. You may find your firm paying for features it doesn't use or need.

Zola Suite

Cloud-based Zola Suite goes all in on time tracking, offering more than 11 ways to track time entries. It also features LEDES-compliant invoicing with Uniform Task-Based Management System (UTBMS) codes.

Despite these benefits, the platform itself is challenging to use. It tries to do too much—making it a jack of all trades and master of none. It also requires QuickBooks for payroll, meaning lawyers can't fully avoid completing manual work across multiple separate apps.

Final thoughts on legal matter management software

Legal matter management software is a no-brainer. The right tools increase law firm efficiency and reduce mistakes, boosting performance while helping firms provide an unforgettable client experience. That said, not all legal matter management software solutions are equal. Some only offer a smattering of automation-based features, many are hard to use, while others aren't even fully cloud-based.

Your firm needs a truly all-in-one, cloud-based, automation-filled legal matter management software. It needs Clio. Cloud-based, truly integrated solutions like Clio give legal professionals the comprehensive features, compliance, and ease of use that modern firms need.

Clio covers everything from intake to billing with Clio Grow and Clio Manage. It is trusted by legal teams, easy to deploy, and offers a variety of plans that fit every firm size and practice area. Don't just take our word for it. When asked what he loved about Clio, Hanna Sampson, Managing Partner at Sampson, Bailey Solicitors, said:

> "As a completely digital solicitors practice, Clio really is the ONLY system that ticks all the boxes. To have a system we can rely on completely at a fraction of the cost of its competitors, puts Clio at the top of its game."

Get started by signing up for a free demo of Clio. You won't look back.

Matter Management FAQs

What is legal matter management software?

Legal matter management software is a digital platform that centralises a law firm's cases, documents, deadlines, and client communications, enabling legal professionals to manage cases more efficiently and compliantly.

How does Clio Manage help with UK legal compliance?

Clio Manage is designed in line with UK GDPR and SRA standards, ensuring your case files, client data, and communications meet strict legal industry regulations. Features like secure document storage and access control help law firms maintain confidentiality and compliance at all times.

Can Clio help law firms improve productivity?

Yes, Clio's workflow automation, unified case management, and integration with leading tools help firms spend less time on administration and more on delivering legal services. Built-in time tracking, calendaring, and automated billing mean you never miss billable work or deadlines.

Which size of law firm is Clio suited for?

Clio is trusted by sole solicitors, boutique law firms, and large legal practices alike. Its scalable features and multiple plan options make it the right choice for any legal practice looking to improve efficiency, compliance, and client satisfaction.

About Clio

Clio is the global leader in legal AI, powering legal work across the profession, from law firms of every size to corporate legal teams, government agencies, and courts. Its Intelligent Legal Work Platform unites the business and practice of law, connecting the people, information, and processes behind legal work. Clio's AI brings the context together with legal sources drawn from Clio Library, a growing collection of more than one billion legal documents. Over 400,000 legal professionals in more than 130 countries rely on Clio to run their legal world. Learn more at www.clio.com.