



“The Accounting & Money Movement Solution for Law Firms & Their Leaders”

Five Core Pieces in a Law Firm Tech Stack

- Billing & Practice Management (PM)
- Payment Processor
- Accounting
- Payroll
- Credit Card / Spending Management

Suggested Stacks

Stack #1

- Billing & PM: Smokeball
- Payments: Smokeball Payments
- Accounting: QuickBooks Online (QBO)
- Payroll: Gusto or ADP
- Spending: Ramp

Stack #2

- Billing & PM: LeanLaw & NetDocs
- Payments: Confido Legal
- Accounting: QBO
- Payroll: Gusto or ADP
- Spending: Ramp

Stack #3

- Billing & PM: Filevine
- Payments: Filevine
- Accounting: QBO
- Payroll: Gusto or ADP
- Spending: Ramp

Stack #4

- Billing & PM: Clio
- Payments: Clio Payments
- Accounting: QBO
- Payroll: Gusto or ADP
- Spending: Ramp

Stack #5

- Billing & PM: MyCase
- Payments: LawPay
- Accounting: QBO
- Payroll: Gusto or ADP
- Spending: Ramp

Exceptions to Consider

- Google Suite Users: Clio is potentially #1 if you use Google Suite instead of Microsoft Office.
- Contingency Firms: Filevine ranks higher for practices built around contingency work.
- Solo Practitioners: If you don't have employees, Ramp won't add much value.

Subscription Level Suggestion

- It's better to “overpay” for the higher subscription level than to create DIY tools. If you'll use a feature in 90% of engagements, pay for the actual tool instead of building something only you can operate.

Product Trends and Insights

Smokeball

A consistently strong product that's improving quickly. Built by the former Time Matters (PC Law) team. More turnkey than most competitors.

Clio

The most well-known name. It's marketed as a flexible "build it your way" system. Many firms realize after 90 days that they would rather tweak an existing setup than be on point for building systems.

LeanLaw

No built-in practice management (and cheapest for that reason). Strong billing platform with true 2-way QBO integration. Integrates well with NetDocs and email.

Filevine

A strong product with good core features. Sometimes heavy on AI and gadgets, but overall solid.

MyCase

Once a very strong product, now a bit behind and the cheapest for that reason.

List of Practice Management Systems to Avoid

- LEAP
- ACTIONSTEP
- AMICUS
- ABACUS
- ROCKET MATTER
- CARET

IT Support Recommendation

Firms should outsource IT with a managed IT services provider. Good providers include your Microsoft Office or Google Suite licensing in their pricing (they'll buy your hardware as well). This simplifies management and ensures your tools stay secure and up to date.

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