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# Review of Needles (Practice Management Software)

By Joshua Auriemma

August 30, 2012



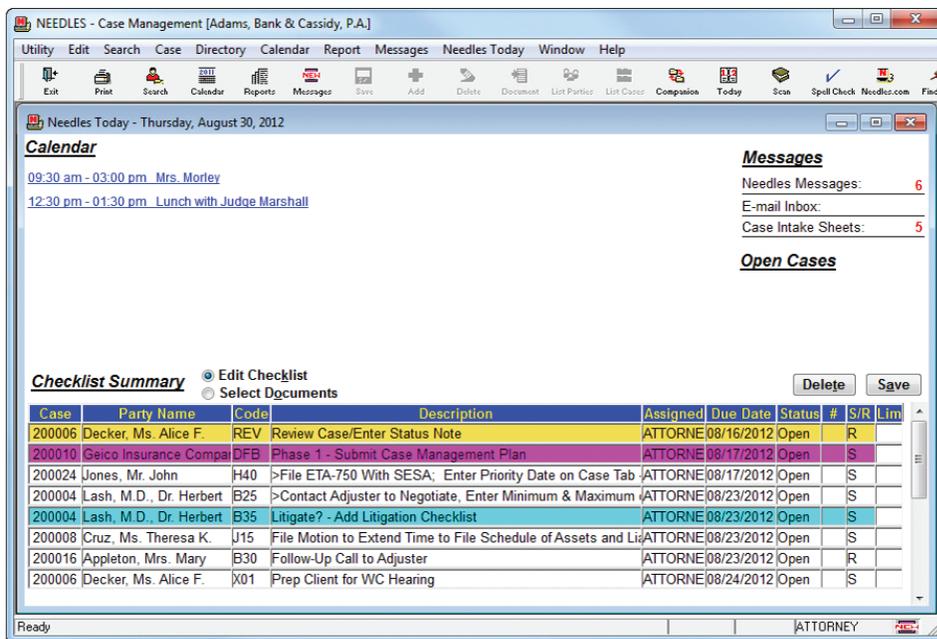
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Last year in *TL Research*, lawyer and appellate legal writing expert Joshua Auriemma explained the process he created for his firm's assessment of practice management systems. Today in *SmallLaw*, Josh reviews the product his small law firm chose — *Needles*. In doing so, he provides not only his thoughts but also those of his colleagues, including the firm's office manager and paralegals. It's rare for a software review to encompass one year of use. Accordingly, this is the definitive review of *Needles*.

It's difficult for me to fall in love with a user interface like that of *Needles*, but it's even more difficult for me to overlook its efficacy and impressive post-setup support.

Just over a year ago, I published an article in *TL Research* (formerly known as *TechnoFeature*), *Essential Questions That Will Lead You to the Best Practice Management System for Your Law Firm*. My article was based largely on the painstaking process I went through to find the best practice management system for our law firm.

I made a conscious decision not to reveal that we had chosen *Needles* because I feel that each law firm should assess its own individual needs in selecting a practice management system. Now that you know we chose *Needles*, you may reasonably ask yourself, "Did Josh find his own advice helpful, or was he totally full of hot air?"



For this issue of *SmallLaw*, I wanted to give you a thoughtful and fair answer to that question so I polled my co-workers. Specifically, I asked the paralegals and the office manager for their thoughts on *Needles* after working with it for a year.

Very few software reviews encompass one year of experience with the product. Appropriately, legendary software developer Dave Winer earlier this week wrote, "You only learn where a product needs improvement through serious long-term use. Users gain that kind of experience, but reviewers and pundits generally do not. Their observations tend to be superficial. That's why reviews written after a few days using a product often miss the mark. The real greatness or lack of greatness in a product doesn't show up for a few weeks or months."

## THOUGHTS FROM THE PARALEGALS

At my firm, the paralegals are the first point of contact for Potential New Clients. They go through the intake process and eventually manage the client file after the client retains the firm. Before *Needles*, the intake was a printed form that the paralegal filled out and placed in a short file. Now, the process is entirely digitized.

**With *Needles*, a paralegal can generate a Notice of Appeal in about 20 seconds as opposed to the 10-20 minutes it took in the past.**

Across the board, the paralegals' favorite feature is the ability to

generate customized documents. A paralegal with whom I often worked tells me she can generate a Notice of Appeal in about 20 seconds as opposed to the 10-20 minutes it took in the past. The Needles trainer coded some of these templates for us, but they also taught me how to make them, so I can churn out new templates as they're needed in relatively short order.

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**Since implementing Needles, our office manager has undertaken significant changes that have resulted in increased revenues.**

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The paralegals like that there's now a centralized database of officers, attorneys, and clients. Such a database is useful for both avoiding conflicts, and for giving me a quick answer when a paralegal is out and I need a client's number.

Amusingly, the paralegals' biggest complaint with the system is the checklist functionality. This is a feature that the attorneys painstakingly scripted so that when we file a document, receive a document, or when a certain trigger event happens, a series of time-sensitive responses pop onto our calendars.

For example, I click a checkbox for "Lost Intermediate Appellate Court Appeal" and two events pop up — one for a Petition for Reargument due in 14 days, and one for a Petition for Allowance of Appeal due in 30 days.

Obviously, with a large caseload, this type of system can seem overwhelming. Still, it's hard to fault a system for making

the paralegals acutely aware of how many deadlines we have approaching at any given time.

#### **THOUGHTS FROM THE OFFICE MANAGER**

Our officer manager is by far the most vocal advocate for Needles at the firm. Since implementing the system, he has undertaken significant changes that have resulted in increased revenues. These changes stem primarily from reports generated by Needles. For example, we abolished an entire practice area because it was fiscally inefficient. We also abandoned unsuccessful marketing sources thanks to some custom-made Needles reports.

He tells me that the time it takes to perform an intake has shrunk since we implemented Needles. In fairness, part of the process of upgrading to a practice management system was developing a streamlined intake process, so there may be a bit of post hoc ergo propter hoc at play here. Nonetheless, it's impossible to deny that the staff is engaging potential new clients at an unprecedented rate.

The one downside the office manager points out is that figuring out how to generate a custom report on your own is nearly impossible. Needles will help you get on your feet by generating a few during your training period, but if you want to design your own reports, it seems that the only way to get trained in that process is to take one of Needles' classes. It's a shame, too because he assures me that the ability to quickly script a report based on a question from a partner that would traditionally have taken days of analysis was worth the price of implementing the system.

#### **MY THOUGHTS**

It turns out that the attorneys at my firm, including me, use Needles far

less often than the staff. If it served as its own electronic filing system, I would probably use it more, but it functions in conjunction with our own server, which is already accessible through Windows or OS X (or Dropbox).

I long for mobile accessibility, and I hear rumors that it's coming. In the meantime, accessing the client database or pulling up a brief from my iPad is doable through a VNC or Dropbox-like service. Still, mobile accessibility and OS X compatibility would be a welcome improvement from the Needles team.

I should also note that Needles was fantastic about supporting its product when we found that the mandatory week of support provided insufficient time to transfer over all of our old forms and get our reports up and running. The Needles team worked closely with our office beyond that one week, even twice sending someone from the company. In its advertising, Needles often plays up its post-sales support. The advertisements are accurate. In terms of setup and technical support, the service is impressive.

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**If you want an extremely customizable practice management system to facilitate data input, case organization, and improve quality of life at your firm, I recommend Needles.**

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#### **TECHNOSCORE**

No one at my firm regrets our decision to implement Needles. In retrospect, it seems crazy that we

waited so long to adopt a practice management system. We have saved time, improved drafting efficiency, and I think, improved quality of life by not having to manage hard files as often.

Again, whether you currently use or are considering a practice management system, do your law firm a favor and make an honest assessment of your workflow right now and consider whether it could use a makeover. If so, it may be

time for you to start shopping for a practice management system.

I give Needles a TechnoScore of 4.5, the highest possible A-. Although it's very effective, I can't bring myself to give it an A because of the user interface. If you want an extremely customizable practice management system to facilitate data input, case organization, and improve quality of life at your firm, I recommend Needles. However, if you want all of that plus a good-

looking user interface, you should look elsewhere.

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**Needles. It's about time.**

**Richard Paresky,  
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*Joshua is a former appellate attorney and current Ph.D. Candidate and legal consultant who spends a large portion of his time contemplating the role of legal technology in the legal profession. Check out his popular [Legal Geekery blog](#) if you are interested in intellectual property, legal technology, or his consultation services.*

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