COMMUNIQUÉ

MAGAZINE

V5 is here

LAWWARE CLIENT BULLETIN MARCH 2022

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Creating the law firm of tomorrow, today.

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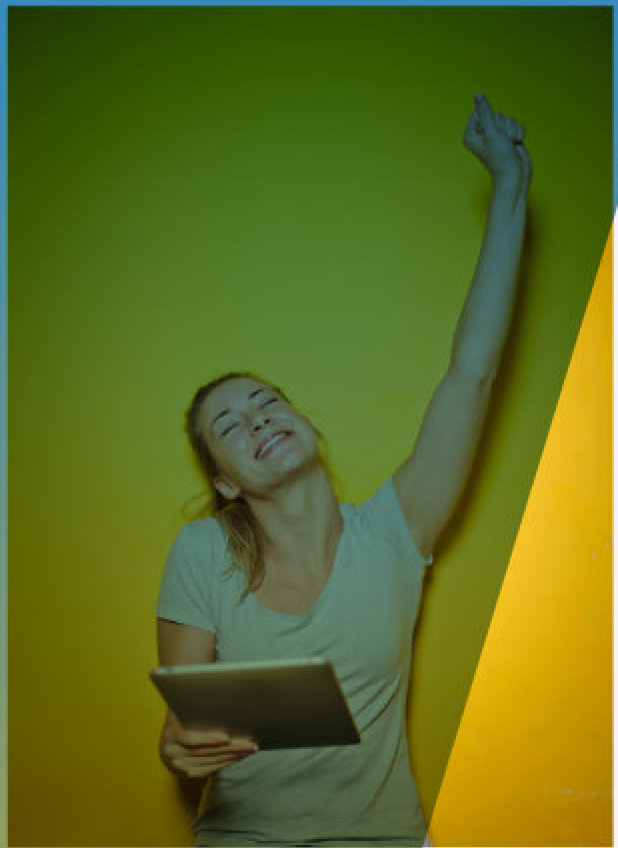

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FEATURES

FIND OUT WHAT'S UNDER THE BONNET

V5 is built on Microsoft's latest technologies, whilst retaining the familiar look, feel and quality that you have come to expect from all LawWare products.

Find out more about the product, its new features and how its many benefits and improvements can help both you and your law firm.

LAWWARE V5: AN EVOLUTION IN LEGAL PRACTICE MANAGEMENT

For well over 20 years, LawWare has been at the forefront of legal practice management software development.

During that time our guiding principle has always been to create solutions that save you time and money, reduce your risk and increase your productivity. Then, we backup our software with high quality support and training.

VERSION 5: A NEW ERA

Now, with the release of our fifth generation of software, we are setting new standards, all designed to improve the efficiency of your legal business.

Version 5 is not just a facelift. It's a completely redesigned application that retains the familiar look, feel and functionality of V4 but with brand-new, powerful additions to help you streamline your work.

That's the technical bit - the benefits are much more wide-ranging. Please take a look at the key new features and benefits to see the difference they can make to your law firm.

CREATING THE LAW FIRM OF TOMORROW, TODAY.

SOMETHING OF A LAND ROVER STYLE EVOLUTION

Our approach to Version 5 has very much followed the Land Rover Defender template. The original Landy was a robust, secure product with great longevity which was recently replaced by a new, even more robust, hi-tech and much improved model.

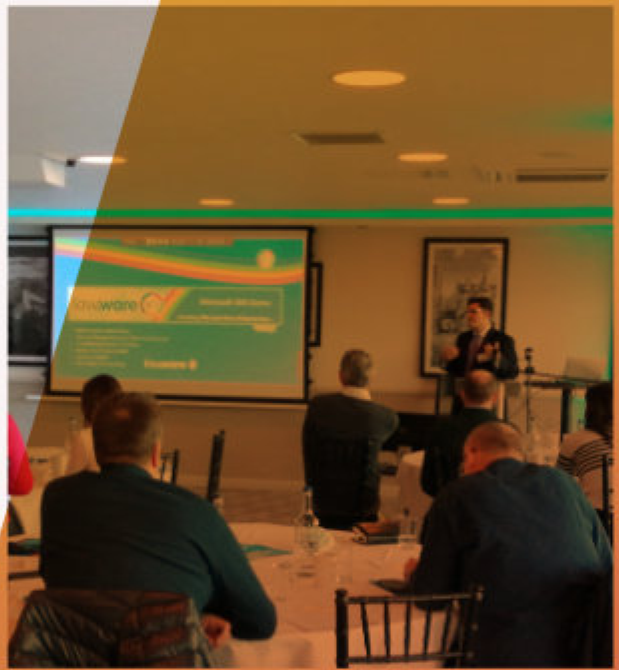
This guided our principles with V5 - still robust and reliable but with many improvements designed to make your work experience simpler and more efficient.

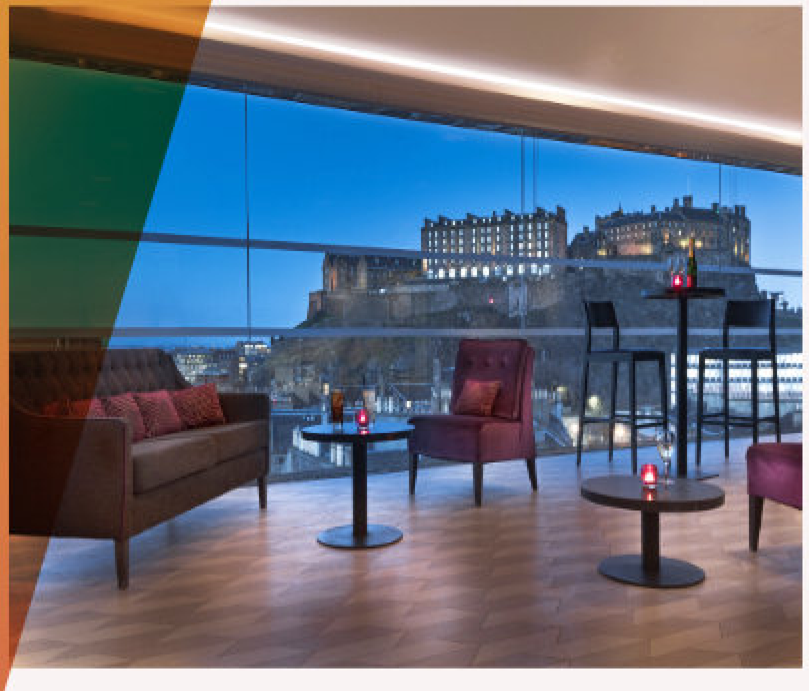
The key new components of Version 5 are listed below.

WHAT'S UNDER THE BONNET?

- Modern design.
- Improved layouts.
- Powerful wildcard search capability.
- Navigation bar for quicker access to your information.
- Personal view designer.
- Excel reports outputter.
- New case file summary screen – for easier access to key information.
- Digital case file previewer – Flick through documents in the activity tab.
- Flexible windows – screen snap in and pop out (multi monitor), sizing.
- Faster onboarding – new Joint clients wizard.
- New case file wizard - compliance improvements -risk assessment form.
- Activities improved time recording with timers – normal phone call, meeting.
- Document production – performance – much faster & with document preview.
- Enhanced email management - auto filing & tracked replies.
- Productivity Centre time slots – live time and target progress.
- Productivity Centre improvement – custom notifications, graphs.
- Security improvements - ethical walls (record level security).

Warren Wander
Founder & CEO.





The LawWare User Conference took place on 9th December 2021 at the Skybar in Edinburgh.

The event covered the launch of LawWare's new V5 product together with an overview of the roadmap for future product development and introduced our new outsourced legal cashiering service, Your Cashier.

Here's LawWare CEO, Warren Wander's view of the day.

USER CONFERENCE REVIEW

A first for LawWare.
This year's User Conference was a landmark for LawWare - the first time we have tried a hybrid virtual / real event. It was a great turnout with over 50 guests attending in person with another 200 plus following the event live online.

The tech. worked really well, showing that this could be the way forward for future events.

Pinnacle Moment.
The key moment for me was launching our new Version 5 software. After such a huge time & cost investment, to finally release this product was a great honour and a testimony to the hard work put in by all our team.

We received a great deal of positive feedback both on the day and after the event about V5 and many suggestions that will guide its roll-out and future development.

We listened…
Your feedback proved to be invaluable and 4 key developments were highlighted and prioritised:

- The need for email templates, which has now been completed.
- Purchase & Sale Calculator Template - also now completed.
- A Scan to Case file utility - In progress
- A slicker way of e-onboarding Clients – Amiqus Integration.

It is our aim to deliver the last two of these as soon as possible this year.

Final thoughts.
It really was great to have a celebration of the launch amidst all the covid restrictions that have been in place for the last two years. Allied to that, the chance to reconnect with our clients, listen to their feedback and insightful comments made the whole experience worthwhile.

We can't wait for the next event following the success of this one, when the focus we hope will be Cashroom side of the software. That's the area we're working towards this year.

My best as always,
Warren & all the team at LawWare.

PREPARING YOUR LAW FIRM FOR YEAR END

yourcashier legal cashiering for solicitors

The past two years have been difficult for law firms. Not only do you need to prepare your law firm for 2022 and any uncertainty it may bring, but you also need to get your year-end accounts in order. It is important to start the year-end accounting process early.

Taking the time now to methodically review your records, close outstanding customer accounts, and budget for next year will give your law firm an edge. It will also be easier for you to plan for the coming year. Additionally, gathering essential financial information from the law firm at the end of the year will help streamline the process when dealing with HMRC and your accountant.

Reviewing your law firm's finances before year-end is critical for setting up the practice for financial success in 2022. So, what could you be thinking about now? support team, all our staff are fully trained to use LawWare and, of course, all our staff are SOLAS qualified and SRA compliant.

Tidy up your client ledgers

Check your client ledger positions and ensure any credit or debit balances over 2 months old have been dealt with accurately. This should also be carried out on your deposit accounts.

Identify and collect on outstanding balances

It is good practice to collect on all debtors in a timely manner, the longer an invoice is outstanding, the less chance you will have to collect the full value of your fee.

- **Ensure time recording and fees are up to date:** Before looking at your collections, it's important to ensure that your firm is on top of time recording and feeing. Make sure that all your fee earners are recording their time throughout the month of February, so that subsequent billing can take place at the beginning of March.
- **Run an accounts receivable report:** Your accounts receivable report will provide amounts outstanding on any open and past-due fee notes. Remember to review any fee notes that are older than 6 months.
- **Identify the outstanding balances:** Your chances of collection decrease with time so it is good practice to identify any overdue balances and act on these before the end of your financial year.
- **Collect Monies:** If you represent businesses, they are usually looking to pay all their expenses before their own year-end. Therefore, it is advisable to get your fee notes out early in March so that your own clients can get on top of making payments. If you represent individuals, you could consider offering discounts for any fees paid before the year end and for any clients unable to pay on time it may be worth considering payment plans.

Review your trust accounts

It is worth spending some time before year end to ensure you have been diligent in moving money from your trust accounts when fees have been generated.

Make sure your client ledgers are balanced: By running a Work in Progress report, you will be able to identify any outstanding time or expenses which can be feed before year end.

Reconcile your trust accounts before year-end: Spend some time to reconcile your trust accounts during February, when you get the bank statements in March this will speed up the process.

Review your financials

The key to setting yourself up for success in the new financial year is to understand how you have performed this year by properly tracking your law firm finances.

- Consider running a comparison report on your revenue and expenses using this year and last year. This will give you an awareness of any overspending or underperformance.
- Establish your cashflow performance on a month to month basis and consider setting up a budget cashflow statement.
- Have you setup a budget analysis report to compare actual to budget? This can be reported on monthly and could be done by nominal, employee or worktype.
- Run a profit & loss statement comparing This month, Last Year, Last Year to date and This Year to date. Look for any trends or patterns which can help you to prepare for the new year.

PAUL MCROBB

Head of Sales and Marketing

Continued overpage...

yourcashier legal cashiering for solicitors

YEAR END FINAL PREPARATIONS

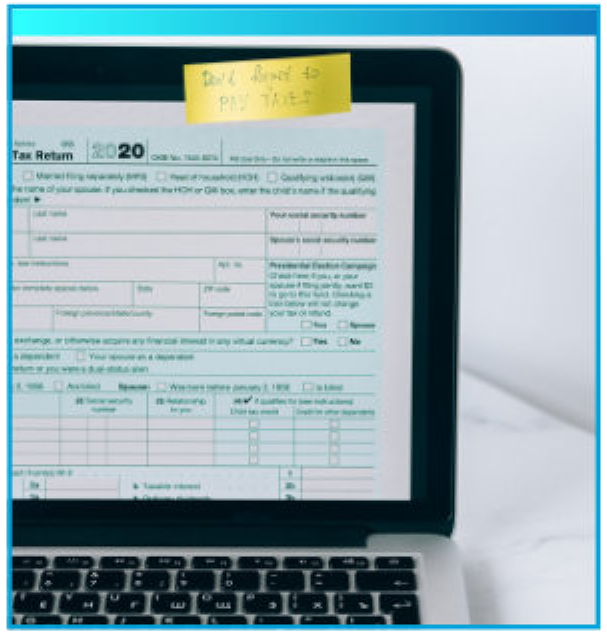
Continued from previous page...

- Prepare a report of fees outstanding (if you have multiple fee earners that can be ordered by fee earner). Review whether this number is growing month-to-month. If it is, you need to be more proactive with your collection process.

Tidy up your balance sheet.

Review your balance sheet items to establish if any can be cleared down. This is a good time to look at your nominal accounts to establish if any can be cleared down prior to the year end.

- Check your drawings accounts, dividends, tax and NI accounts, the current year should only be shown.
- Are you using suspense accounts to hold any unidentified funds, if so, these should also be cleared down.
- Are your loans being recorded correctly, they should be recorded as a credit and match the balance on your loans statement, they should not be recorded as a debit.



Whether you are based in England, Scotland or Wales, the accounts rules are complex. Our outsourced cashroom service will ensure your books and records are kept fully up to date.

I would welcome the opportunity to tell you more about our services and how we have already helped law firms like yours.

Paul McRobb,
Your Cashier Head of Sales and Marketing.

Tel: 0345 2020577
Email:
paul.mcrobb@yourcashier.co.uk

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CRM

HOW CAN WE HELP?

Since 2020 I have had the responsibility for LawWare's CRM strategy. As a Company we had previously decided we wanted to be more noticeably serious about helping clients do more with their LawWare system, and to help achieve this clear focus we created a dedicated role, called Client Relationship Manager.

We appointed a high-quality individual to this role and we support both him and you with a graded service level that aims to enable each of you to receive a befitting service. This is our Graham Dingley.

Types of client

Very broadly speaking we have 2 types of client –

- Those with a single software module (Cash Accounts). Oftentimes a single user, they use their software for financial compliance.
- Those with Cash and Case Management modules (often more) and deploy the software across the entire firm. They are looking to extract a high level of productivity from their IT investment.
- And then there are those that fall between the above two camps – a firm-wide Cash Accounts system or a low number of Case Management users (perhaps focussed around some WorkTypes). Efficiency is a goal but not necessarily the main objective for these clients.

This gives us a broad client base, where each firm has a distinct view of how it wants to use their system. Whilst recognising these broad characteristics we assure all our clients that we are pleased to accommodate any firm's individual objectives and work with them to achieve their aims.

Still Clients sometimes say to me – "we only use a fraction of the software, and I am sure we could use more of it if we were shown how."

If you are a client that would like free help with improving the usage of your LawWare or LawCloud system, or, would like a review of the scope of your system, either in terms of the breath of aspects it covers, or the depth to which your system goes, then Graham is the man to speak with.

With V5 in sight, let me give you a tip – optimise your current V4 system before the move to V5, that way you will be best placed to focus on the new things that V5 brings when you get it. Graham Dingley is going to explain about the LawWare Health Check and explain what we mean by 'optimise your V4 system'. Some clients will be offered the upgrade to V5 very soon; don't worry – a Health Check can be conducted on a V5 system as well as a V4.

SIMON SAYS

By Simon Greig, LawWare's Sales Director

CRM

HEALTHCHECK ANYONE?

One of my roles as the Client Relationship Manager is to ensure that you are making the best use of your LawWare or LawCloud system. This is done via a Health Check. You will have hopefully heard of this service we provide. When I first start to talking about Health Checks the questions I am usually asked are:-

GRAHAM DINGLEY

LawWare's Client Relationship Manager

- What are the benefits to my firm?
- How does the process work?
- What is the cost?

BENEFITS

The benefits of a Health check are typically

- More efficient use of the software. Many of you are only using a small proportion of the features of the software. This is partly a historical issue as more features have been added to the software over time which you might not be fully aware of.

- Staff engagement. When I am talking to people I sometimes hear it would be good if LawWare could do this or that, for example "Help with Risk Assessment". Oftentimes LawWare can do something, it is just that no one has shown you how.

- Staff Training. The Health Check can highlight areas of staff training required. This training can be achieved by on-site training or by Webinars or On-line training via the LawWare Academy

- More efficient recording of Management Information. Using LawWare to give the Partners a better feel of the business.

SO WHAT DOES THE HEALTHCHECK PROCESS INVOLVE?

- Taking a look at your system This means me logging into your system (with your express approval) and going through a checklist of features to see if you are using or have implemented various functions within the system. I will cover some of the questions in the checklist later.

- Reporting Back. This involves a discussion with you showing the findings and frequently asking the main question – Why do you do this? The answer is usually: "Because we have always done it this way".

- Helping implement recommendations. After the discussions there can be various follow up points: - showing where things can be changed, ensuring that you have the correct permissions to make the changes, organising on-site training and discussing the LawWare Academy's courses in order to roll out the agreed recommendations

Every firm is different but the common aspects I tend to include while conducting a Health Check are:-

- Money Laundering used. Are you using the inbuilt ML features within LawWare, or is every Client just marked as an "Existing Client".

- Risk Assessment. Is the Risk Assessment module switched on, and if so are the questions and answers amended to suit your business. Questions can be asked that are specific to individual work types. Sources of funds can also be attached to the Risk Assessment.

- GDPR rules setup. Based upon your Terms of Business you can specify how many years you will keep client's data before it can be removed. These are specified per worktype. The default LawWare setting is 5 years but very few firms have changed this.

- Changing the Front Screen. This is one of the easiest things to do but so many clients don't change the Front Screen. When you first have LawWare installed the main Casefile list shows the default list of columns. Each user is able to change the columns displayed - for example why not show the Client's phone number on the front screen. This saves time having to open up the Casefile or, dare I say, the paper file to obtain the number. You can display the Last Activity Date, this shows the last time an activity (piece of work) was performed on the file. Then you can filter by this to see the casefiles that haven't been worked on for the last 30 days for example.

- Database extensions. Database Extensions are one of the main tools in the LawWare armoury to improve efficiency. Database Extensions are user defined extra fields linked to specific worktypes or clients. If your work involves conveyancing then you can setup Database Extensions for Date of Entry, Sale/Purchase Price, Address of the Property, etc. For executry - Date of death, etc. For Court work - Date of next Court Appearance, etc. Once these Extensions are setup you can display them on the front screen and so filter by, for example - dates of entry happening this month or next month. These Database Extensions can also be used in your document templates.

HEALTHCHECK SUMMARY

MORE DETAIL

- Standard Narratives in Activities. When recording an activity you can setup standard narratives, this then saves having to type the same notes in the file. My favourite one is "Phoned the client who was engaged at the time but left a message for them to phone back".

- Is the Strongroom used and have Review Dates been set. The Strongroom allows you to record documents that you hold for a client for example signed wills, powers of attorney, court documents, title deeds, etc. Within the system it is easy to set Review Dates. Once this Review Date has been reached the system will flag up on the record and support you to contact the client. So, for example, if a will was recorded 5 – 10 years ago with a Review Date of today you could mailshot the client stating that their will is due for review and also mention that they may be interested in setting up a power of attorney. Which is good for your business development.

- Data Cleansing: - Archiving of old Worktypes no longer needed or used. The removing of old Fee Earners and Partners from the drop-down lists when creating Clients and Casefiles. Archiving Casefiles once a case is finished, when archiving you are not losing any information but just moving it from the list of current casefiles. Tidy up your templates – check the wordings, if they are no longer used remove them from the list. All of this Data Cleansing will make the transition to V5 more straight forward.

THE COSTS

Finally what costs are involved in these Health Checks :-

- Time – your time with regards to the reporting back on the recommendations.

- Implementation of recommendations – there may be a time involved here to encourage the staff and fully setup the system.

- Financial Costs – 9 times out of 10 there are no financial costs. If there are any costs, they will be things like On-site training, Purchasing of new modules or Adding new users, which are helping you achieve real aims like increasing productivity, better sharing of information and/or improved management information.

If this has whetted your appetite for a Health Check please give me a call or email:

graham.dingley@lawware.co.uk

LegalTech software experts LawWare and Exizent join forces to seamlessly provide leading executry and estate administration functionality to LawWare users

LawWare, specialists in legal practice management software, and Exizent, the leading provider of estate administration software to the UK market, have teamed up to integrate their market-leading platforms and provide LawWare users with seamless access to Exizent's deep specialist functionality. This will enable firms across the UK to conduct their estate administration work more efficiently and deliver a higher level of service to clients.

> "This collaboration is a win-win for LawWare and Exizent users and will make the entire case journey more efficient, more accurate and more secure for law firms and, most importantly, better for their clients and loved ones.
>
> Aleks Tomczyk
>
> Founder and COO, Exizent

With an excellent track record in case management innovation and over 480 customers, LawWare provides industry leading legal practice management software, offering a one-stop-shop for legal services firms operating in the UK.

Exizent, which launched in late 2020 to help those dealing with the administrative tasks following a death, is a unique cloud-based platform that connects the data and services used by legal firms and institutions, such as banks, to revolutionise the bereavement process, making it easier for all involved. Supporting legal firms across the UK managing probate and confirmation, Exizent provides a way to significantly improve efficiencies and allows users to take advantage of industry changes and digitisation within their existing workflows and processes.

The real-time integration of Exizent and LawWare's cloud-based solutions will mean that key information from a case stored on the LawWare platform can be easily and seamlessly transferred into a case on the Exizent platform by users. This makes the early stages of the case management more efficient, accurate and secure by significantly eliminating re-keying, and makes the management of cases much, much simpler. Using APIs to achieve this means the integration will also be really quick and easy to put in place.

> "We adopted Exizent early on in the product's life as executry cases are complex, we loved Exizent's vision, and we want to give the best possible service to our clients at what is always a difficult time.
>
> Katie Stevenson
>
> Solicitor, McJerrow & Stevenson

LawWare and Exizent are committed to solving problems for users, effortlessly bringing legal sector technology innovation to users. Both companies see the relationship and integration announced today deepening over time providing greater integration and optimising estate administration through additional data and collaborations that build on the specific complementary strengths of their applications.

This partnership follows a number of important initiatives announced by Exizent in 2021, including partnering with Experian to deliver integrated search, which instantaneously returns information on the deceased's credit file aiding identification of assets and liabilities.

Simon Greig, Sales Director of LawWare said:

"LawWare has been built for forward-thinking UK law firms to take care of all their matter management, business processes, accounts and financial management needs. Exizent's platform has been created to help make the executry process easier for legal professionals. By integrating the two, we grow our product offering by enabling our users to retain access to all the information they need from their cases, both within LawWare and within the Exizent platform, helping those working on confirmation, probate and estate settlements to manage their workload better and significantly improve process efficiencies, accuracy and security."

Aleks Tomczyk, Founder and COO of Exizent adds:

"Through our API-based integration with LawWare, legal firms will be able to quickly import the relevant information needed to work cases using Exizent's advanced functions. There will be no rekeying of client or initial case details and instead, a seamless transfer of data. This collaboration is a win-win for LawWare and Exizent users and will make the entire case journey more efficient, more accurate and more secure for law firms and, most importantly, better for their clients and loved ones."

Katie Stevenson, Solicitor of McJerrow & Stevenson is a customer of both LawWare and Exizent.

Commenting on the partnership, Katie said:

"We use both LawWare and Exizent's platform as key tools within our firm. We have been using LawWare for many years and it is a vital part of both running the business and enabling us to provide good service for our customers. We adopted Exizent early on in the product's life as executry cases are complex, we loved Exizent's vision, and we want to give the best possible service to our clients at what is always a difficult time. We have been really pleased with the tools Exizent gives us and are really impressed with the speed of new functions they have been adding. We are thrilled therefore to see this announcement and look forward to seeing the integration work."

Exizent is the industry platform for professionals involved with managing the bereavement process. When someone passes away, Exizent connects the data and services used by legal services firm, banks and financial institutions, and executors to sort out what's required to make the journey for the bereaved an easier one. The Exizent platform is an integral part of the bereavement landscape helping to reduce uncertainty, increase speed and overall, make the process more straight forward for everyone.

It's a business inspired by powerful stories, stories of people who have lost loved ones that have then found themselves caught in a web of complexity at a time of personal anguish. We don't believe it has to be this way. By connecting the professionals, institutions and executors tasked with sorting out the administration involved when someone passes away Exizent is reducing the burden on those grieving.

If you would like to learn more about Exizent's innovative platform and how it can benefit the bereavement process, contact [Simon Greig](#) today.

exizent

IS YOUR WEBSITE DOING THE BUSINESS?

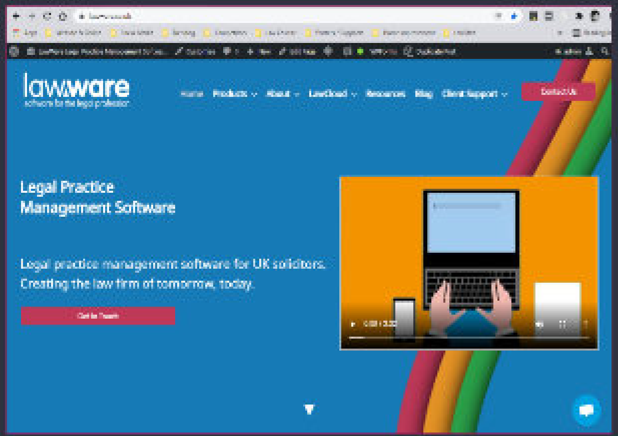
No legal practice can market itself effectively nowadays without a website. The question is, how do you get yours to do the business? Let's take a look at a few of the key considerations.

We really do live in the age of the magpie mentality. Internet searching for legal services is the norm and, no matter how near the top of the search engine rankings your practice is, the back button is just one click away. If your website doesn't engage viewers instantly or is difficult to understand, they're gone. So, consider the following:

Make it easy to contact you.

It sounds obvious but you'd be surprised by how many legal websites don't do this. The basic rule is to place your telephone number and email address prominently - preferably at the top of all pages on the site.

The call to action or contact form should also be prominent. You can do this easily with a contact button which leads to a short form. Short is of the essence - long forms deter visitors from completing them.



Ensure your site is mobile friendly.

Well over 50% of all visitors to your site will be using a mobile device. That means it has to work just as well on a phone as it does on a desktop PC. That can be achieved relatively easily with modern web design software and templates. It's also well worth the effort as non-mobile friendly sites deter visitors and do not rank highly in Google's search engine.

Content.

Your first consideration for content is your home page. The better ones tell visitors they are in the right place and provide clear information on the legal services you deliver in down to earth language rather than "legalspeak".

Always try to write your content from the point of view of a client. So, it might be better to use descriptions for your services like dispute resolution or property rather

than litigation or conveyancing. That done, if you have legal accreditations valid to your clients' needs, don't forget to mention them.

Look and feel.

I've lost count of the number of law firm websites I've seen that look tired and uninspiring. Images of gavels and bookshelves filled with tomes of case law may be relevant to you, but are they to your clients? If you use imagery, make it relevant.

Speed.

Too much imagery can slow your site down. How quickly the pages of your site load is really important for two reasons. Firstly, a slow site will put off visitors. Secondly, Google penalises slow loading sites and that will dramatically affect your search ranking.

Google tests the speed of your site using a simulation of an old 3G mobile device as its benchmark. Test your site using Google's own "PageSpeed Insights" (https://pagespeed.web.dev/). If it scores less than 90% for mobile load speed, you are less likely to appear on page 1 of a search.

SEO.

Search Engine Optimisation is the technical bit. In simple terms, it means the process of improving your site to increase its visibility when people search for your services in Google and other search engines. It involves key phrases, titles, slugs, meta descriptions and much, much more.

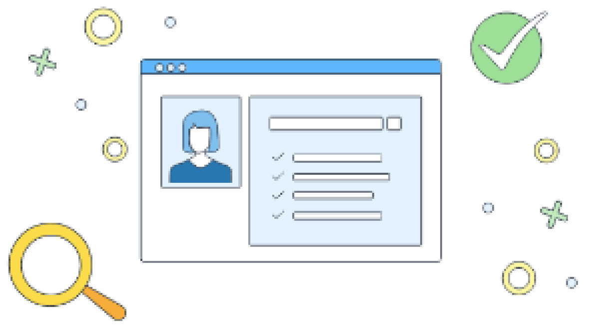
If this terminology means little to you, you need help from a specialist. A good SEO developer will be able to manage your site efficiently, tailor it to your audience and speed it up to ensure you remain visible.

Having recently rebuilt the LawWare website to accommodate Google's latest SEO changes, it is now starting to rank higher and load much faster. So, if you'd like an honest appraisal of your website's performance, please give me a call.

Mike O'Donnell.
0345 2020 578 or
mike@lawware.co.uk.

Mike O'Donnell is LawWare's Marketing and Brand Manager

We are delighted to announce the recently signed partnership between LawWare and Amiqus.



Having listened to our clients, we are looking to bring our LawWare users an integrated AML product and Amiqus is by far the best fit. Their product is comprehensive yet easy to use and they are continually innovating to be at the forefront of technology and regulatory change. At the same time, we align with their values as a business: accessibility, trust and privacy. We know that we already have many mutual-user firms, but hope that this formal partnership brings many more in the coming months and years.

Gregor Angus, Senior Business Development Manager at Amiqus, commented "We are passionate about partnerships and bringing the benefits of collaboration to our users. The partnership with LawWare is a prime example of that – we know they offer a fantastic practice management system and by integrating with Amiqus, their users will benefit from an AML perspective not just in doing things digitally, but doing things in a better, more efficient way. LawWare users will gain a secure, easy-to-use platform, automated chase up tasks, significantly reduced manual admin, while at the same time ensuring watertight compliance. Just as importantly, clients will enjoy a better experience of using your firms' services - a key differentiator for you in winning and retaining business.

Clients can complete an Amiqus request on their phone, tablet, laptop or PC, at a time and place convenient for them. They no longer need to come into your office with ID and copies of documents, saving both parties significant time and effort.

Amiqus is also the Law Society of Scotland's Strategic Partner for AML and Lawtech. This can give you peace of mind that our product has regulatory compliance at its core, and that we are constantly improving the platform to ensure our users benefit from technology advances, or comply with changes in regulation. We look forward to welcoming many more LawWare user firms to the Amiqus user base, and are pleased to offer an introductory discount to any firms that join us via the partnership."

amiqus

For more details, or to arrange a demo of Amiqus, please contact sales@amiqus.co, visit their website www.amiqus.co, or ask one of the LawWare team for more information.

Securely and remotely complete your AML and KYC compliance checks

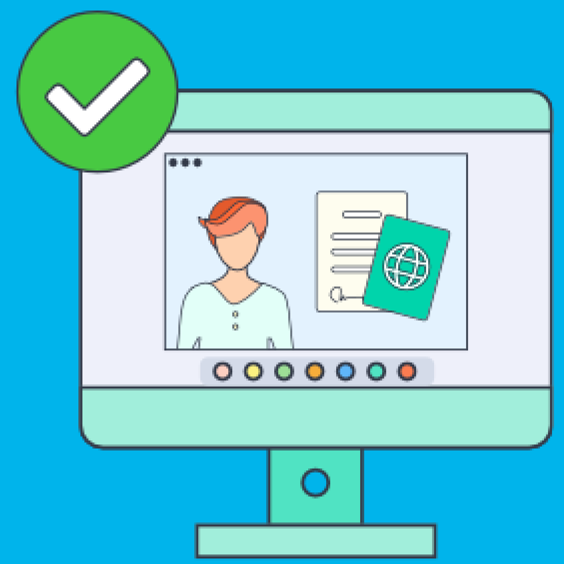
- The market leading AML compliance platform
- Trusted by over 350 law firms
- The Law Society of Scotland's Strategic partner for AML and Lawtech
- Reduce admin time and ensure watertight compliance

For more details contact:

sales@amiqus.co

Visit us at:

amiqus.co/sectors/legal



amiqus lawware V5

Focus on being productive instead of being busy.

Legal admin slows you down.

You qualified as a lawyer to practice law - rather than to be a business administrator. That's where legal technology comes in. LawWare Version 5 is designed to eliminate or streamline all those necessary but annoying tasks that hold you back from fee earning.

LawWare Version 5 - putting you in charge.

0345 2020 578

innovate@lawware.co.uk

lawware.co.uk

lawware

Creating the law firm of tomorrow, today.

V5