Achieving
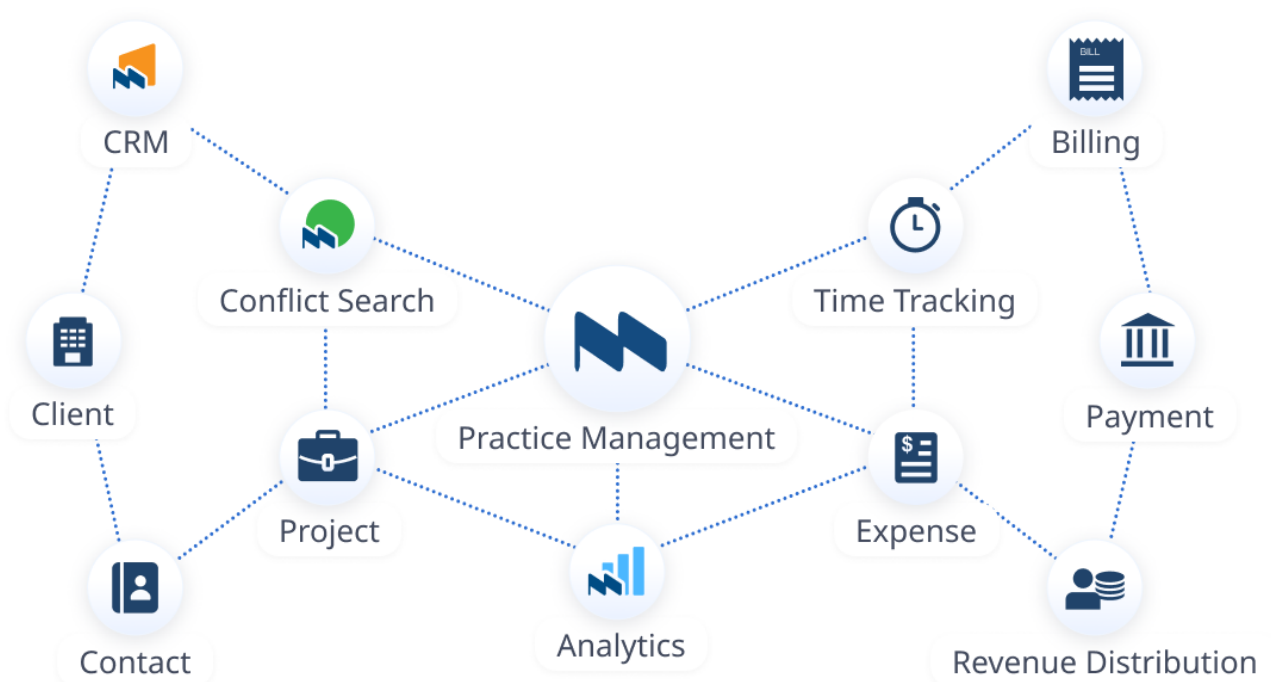# Operation Excellence

Practice Management For Professionals
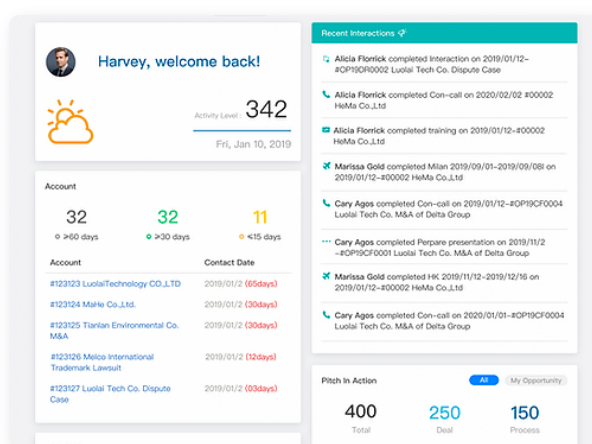
Specialized for Professional Teams
The key to achieve operational excellence

MATTEROOM is a Practice Management solution tailored for professional service organizations, such as Legal, Creative Services, Software Development and IT Services, Architects, Engineering Design, Management Consulting, etc. MATTEROOM adopts micro-service architecture with container-based deployment to ensure the Total Cost of Ownership is significantly lower than big Tech names in the industry. MATTEROOM helps professional service firms run their full operations on one comprehensive system. Our One Backend Architecture powered applications built on the Project-Centric concept make it easy! Manage and organize all functions such as Client & Project Management, Time Tracking, Expense Management, Billing Management, Customer Relationship Management, Reporting, Annual Performance Review, Conflict Search (legal only), and Big Data Analytics across all devices, all in one solution.

Customer Relationship Management (CRM)

Our design ensures all data to be analyzed from different angles in real-time, and increases the cross-selling opportunities. A client-centric CRM simplifies the complex process into only two stages. First, it tracks all customer/contact activities incorporating billing information, like payment terms & discount levels to determine each customer's behavior. Secondly, it tracks profits and other financial contributions to present your customer value digitally.
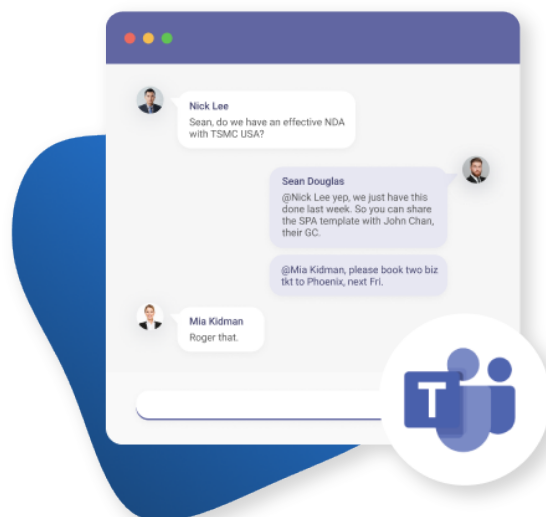

Tracking Anytime & Anywhere

The CRM Dashboard shows the latest activities, customer interactions, user comments, and ratings in real-time. This notification framework not only sends emails, but popular social collaboration networks are connected to help professionals avoid missing any critical updates.

Cross-selling Across The Firm

MATTEROOM CRM helps the partners determine and record all of the client's needs to exercise cross-selling different services when the opportunity arises. Our CRM helps firms track internal referrals.
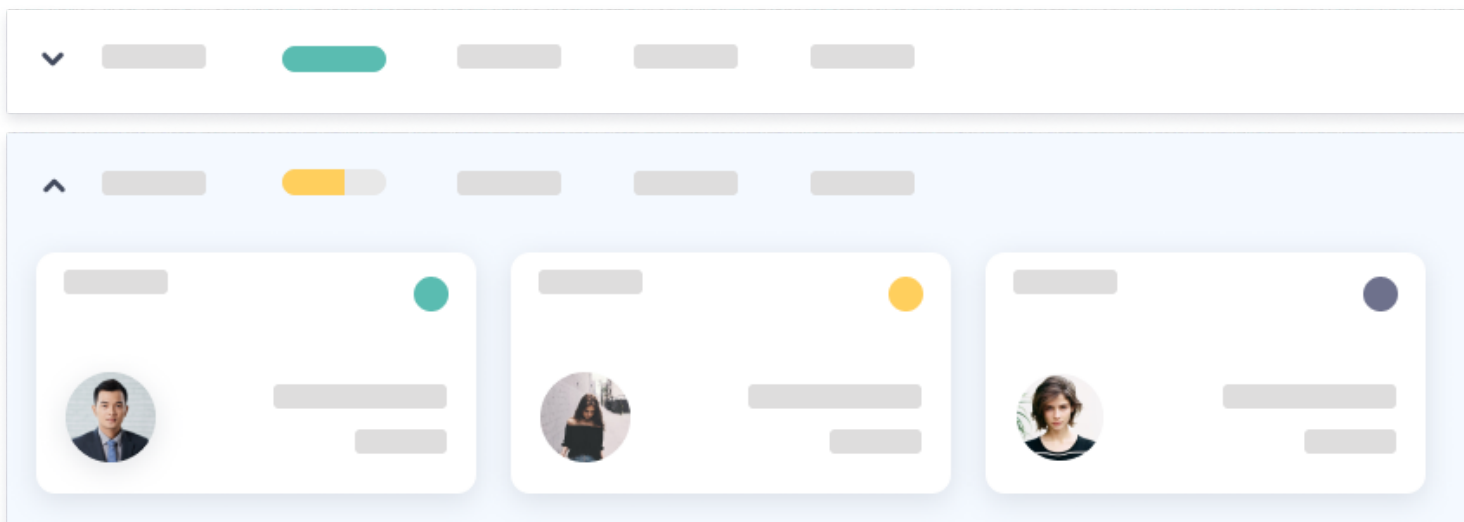
Project Management

All information stored is Project-Centric. Documents and other digital assets are guaranteed to be stored properly around a project, while financial and performance analytics can also be accurately presented.

Milestone & Task Management

Milestone & Task Management intuitively define the project schedule in phases. The team can quickly understand the progress and identify any risk, or pitfalls.
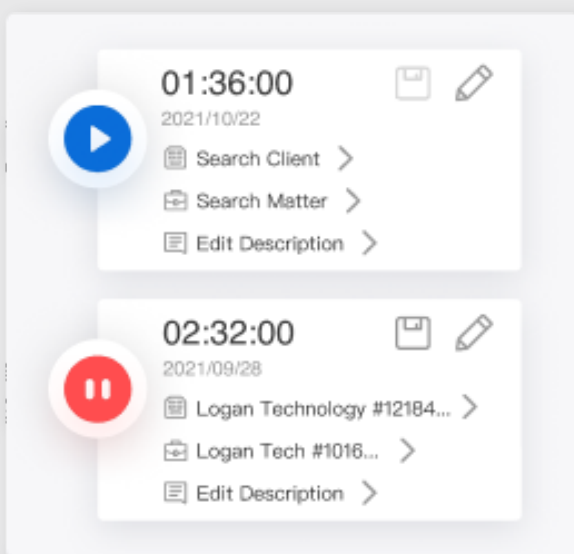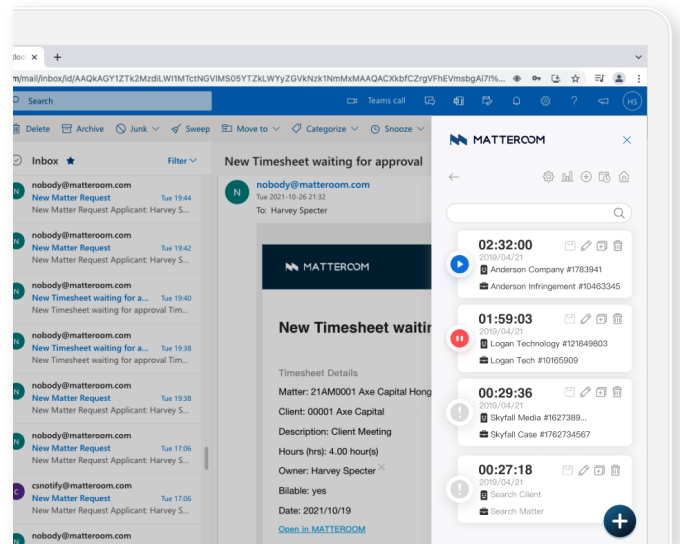Like the backbone of any quality Practice Management Solution, the system supports industry-standard task code but also supports customized code and integration.
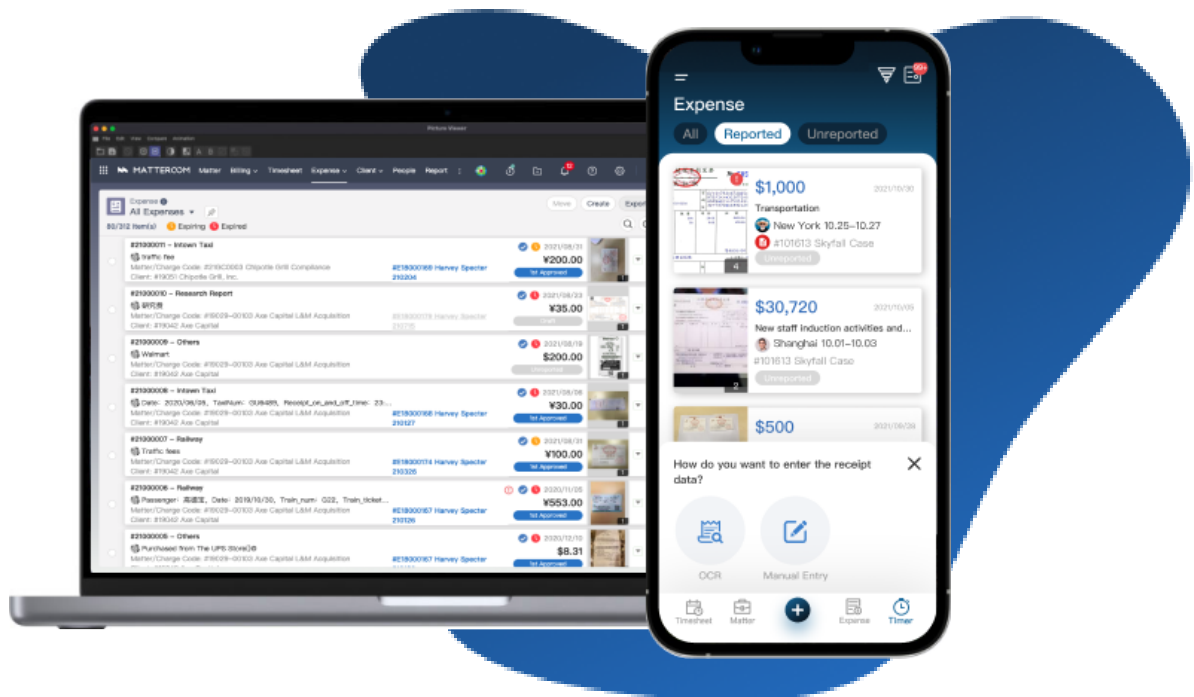
Time Tracking

■ Clock Anywhere & Anytime

Timekeepers can clock anywhere and any-time using our mobile app and Office Add-on. The clocking feature is device-in-dependent and works across platforms.

The clocking function is cross-device and cross-platform; so you can record, track, and distribute billable hours anytime, anywhere via Web, Mobile App, and Office add-on. It also supports minimum billable minutes, self-configuration, and clocking accumulation. We are integrat-ing with other applications like Phone Systems, Outlook, and Messenger to make it more intelligent.
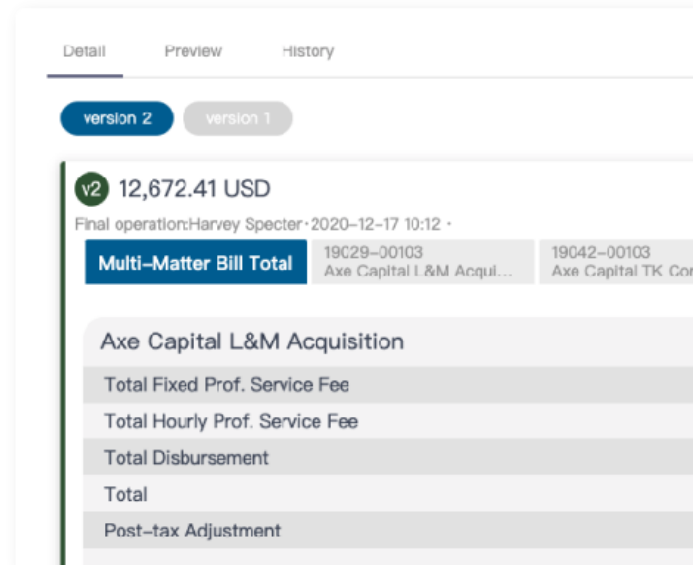
Expense Management

Expense Management is no longer a painful process because expense submission and approval can all be done via the App, reducing overhead significantly and saving your administrative support staff from the physical "Paper Ocean". This module also offers Smart OCR Add-on, whereas digital photo receipts can be auto-recognized and populated into the system, saving hours on boring data entry. Our Single Expense Rejection also makes the approval process much more efficient. Authorized users can approve a single expense or the whole expense report via App, too.
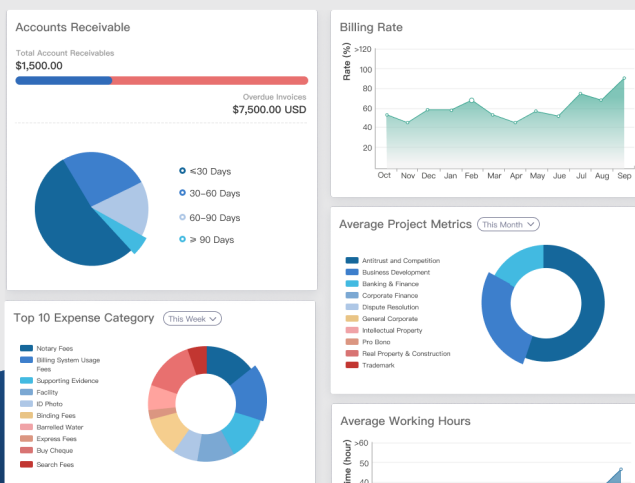
Billing Management

Versioning

MATTEROOM intelligently generates invoices combining billable hours and project fees. Even adjustments like tax or discounts can be handled on the fly. It supports versioning; tracks the payment behavior of customers, which can help management understand the progress of receivables.
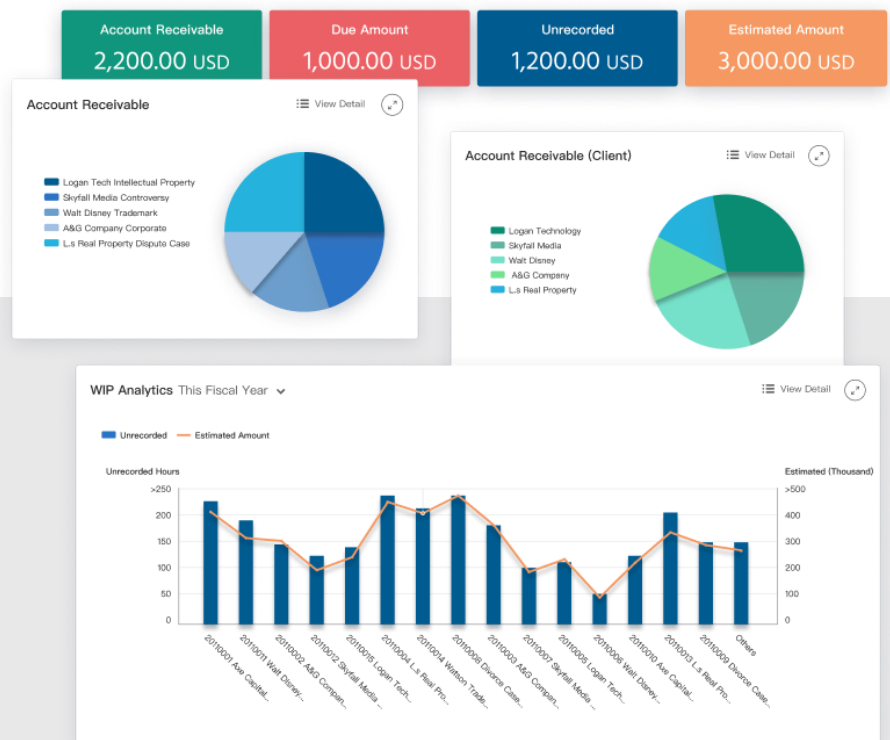

Visualization

With visual presentations related to bills and payments, MATTEROOM enables management to track the financial status of each project anytime, as well as key performance indicators such as available budget, billable & non-billable hours ratio, aging receivable payments, and more.

Analytics

The intuitive analytics widgets can be presented in real-time, so key stakeholders can instantly appreciate the performance of an individual, a team, and financials of a single matter, practice team, or the whole firm. MATTEROOM provides Analytics against the ONE backend eliminating silo data to drive accurate business insights. By gathering the data of each dimension, management can comprehensively view the firm's operation profile. The more you know, the more you can act. The same engine also supports Conflict Search and can be extended into a full-blown Data Warehouse.

Conflict Search Legal Only

Conflict Search indexes Practice Management data, providing powerful discovery capability to quickly identify conflicts by context. The system also provides various configurations to ensure the best practices are adopted by your firm.

Pre-Search

The Pre-search function is a full search GUI that provides a unified view for users to search for any content. By providing powerful and intelligent filters on the fly, users can identify a conflict or non-conflict within seconds.
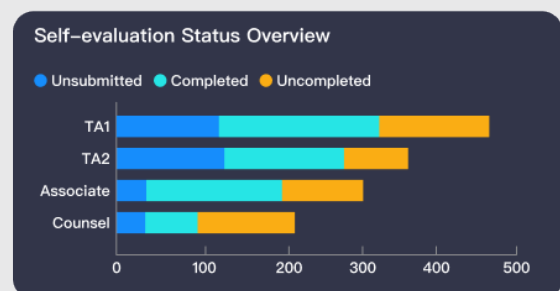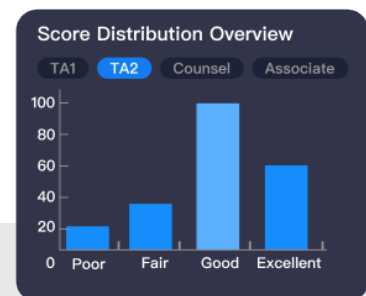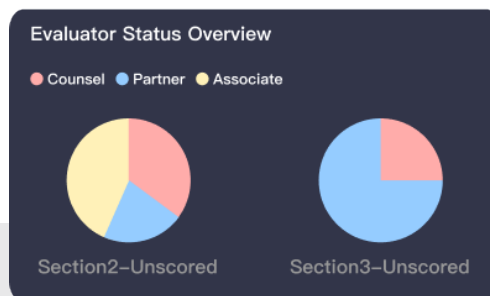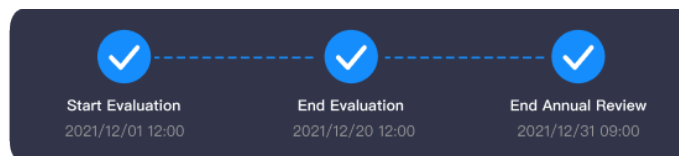

Powerful Flow

MATTEROOM has a strong process management system capable of handling complicated approval logic and scheduling. All user interactions are fully logged to provide a full audit trail. This vital capability can also be easily scaled for large size firms.

Annual Performance Review

Annual Performance Review module is only available for the Enterprise edition, the system intelligently picks Reviewers not only from Org-chart but also allows co-worked colleagues in high pay grade to be able to review the employee's project-based performance. The system also calculates the score by using Pro Service Industry best practice to eventually give us an objective and digitized score to each evaluate.

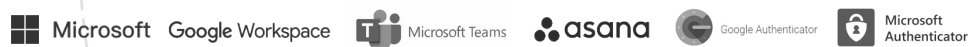# Seamlessly integrate with the world's most powerful softwares

Building a strong technology ecosystem

File Management System

Google Drive · OneDrive · iManage

MATTEROOM is highly integrated with the world's leading document management systems (Document Management): Google Drive, One Drive, and iManage. Single-click in MATTEROOM will automatically create a file workspace for the corresponding project in the document management system and fully synchronize member permissions.

Tool Application

Microsoft · Google Workspace · Microsoft Teams · asana · Google Authenticator · Microsoft Authenticator

MATTEROOM integrates the world's most advanced tool applications: Microsoft 365, Google Workspace, Microsoft Teams, Asana, Google Authenticator and Microsoft Authenticator. Eliminate the inconvenience of frequent platform switching. Integrate multiple applications on one platform, no need to search and switch, make your work more efficient and professional.

Pro is a DNA.

MATTEROOM