Checklist: Essential Features of Firm Management Software

A modern firm management platform should cover every aspect of running your business in one system. When evaluating your options, use this checklist to ensure it has the essential features your firm needs:

Time & Expense Tracking

- [ ] Simple, accurate time entry from web or mobile.
- [ ] Multiple input options: manual, stopwatch, weekly, or daily.
- [ ] Approval workflows for timesheets & expenses.
- [ ] Mobile expense capture with photo receipts.
- [ ] Expense policies, categories, and direct project links.
- [ ] Real-time sync to billing, payroll, and project budgets.

Project Management

- [ ] Centralized project hub with contracts, phases, and subconsultants.
- [ ] Gantt charts and visual timelines for scheduling and task tracking.
- [ ] Milestones, dependencies, and progress tracking.
- [ ] Budget and fee tracking tied directly to contracts.
- [ ] Change management tools for scope and fee adjustments.
- [ ] Document management integrated at the project level.

Resource Planning

- [ ] Forecast staffing, capacity, and workload in real time.
- [ ] Align resources with budgets, schedules, and utilization targets.
- [ ] Drag-and-drop planning with alerts for over- or under-allocation.
- [ ] Compare planned vs. actual utilization to improve forecasting.

Dashboards & Reporting

- [ ] Role-based dashboards for principals, project managers, and accountants.
- [ ] Real-time visibility into utilization, profitability, backlog, and WIP.
- [ ] Drill-down capability from high-level summaries into detailed reports.
- [ ] Pre-built and customizable reports for projects, clients, staff, and financials.
- [ ] Scheduled reporting and automated email delivery.
- [ ] Export options to Excel, PDF, or BI tools.

Accounting & Financials

- [ ] Fully integrated general ledger, AR, and AP with project-level accounting.
- [ ] Cash flow forecasting and bank reconciliation tools.
- [ ] Multi-currency support and tax configuration.
- [ ] Real-time financial dashboards with revenue, profit, and margin KPIs.
- [ ] Automated journal entries and audit-ready reporting.
- [ ] Direct sync to payroll, expenses, and billing modules for a complete financial picture.

Billing & Invoicing

- [ ] Flexible billing structures: hourly, fixed fee, phased, percent complete, cost plus, etc.
- [ ] Automated and batch invoice generation and recurring schedules.
- [ ] E-payment integration and automated payment status updates.
- [ ] Customizable invoice templates with branding and reporting fields.
- [ ] Retainer management and WIP tracking

CRM & Pipeline Management

- Track leads, pursuits, and proposals from first contact to contract.
- Manage opportunity stages, win probabilities, and pipeline forecasts.
- Convert awarded projects directly into live jobs with full financial context.
- Integrate with email and calendar tools for activity tracking and follow-ups.

Payroll & HR

- Embedded payroll with automated tax calculations and filing.
- Employee onboarding and self-service for payroll and HR tasks.
- Automated direct deposit without manual NACHA file handling.
- Centralized employee profiles with roles, pay rates, and utilization.
- PTO, sick leave, and overtime tracking.

Support & Implementation

- Dedicated implementation specialists for onboarding and data migration.
- Structured rollout plans customized for firm size and complexity.
- Extensive knowledge base, video tutorials, and in-app in-app contextual help center.
- Live and on-demand training sessions for continuous learning.
- Customer success team monitoring adoption and satisfaction over time.
- 24/7/365 phone, chat, and email support.

Security & Administration

- Role-based and record-level permissions with audit trails across modules.
- SOC 2 compliance, GDPR-aligned controls, and data encryption.
- Single Sign-on (SSO) authentication with leading identity providers
- Granular workspace and multi-office administration controls.
- Automatic backups and secure data hosting with 99.9% uptime.
- Secure access with MFA support.

Integrations & API

- Open API for custom workflows and integrations.
- Pre-built connections with major payment, accounting, and productivity tools.
- Webhooks for real-time synchronization with external apps.
- Flexible import/export utilities for legacy data and external reporting.
- Cloud-based, remote access and mobile access from anywhere for distributed teams.
- Full-featured iOS and Android apps that include time, expenses, approvals, CRM, PM, and accounting functionality.

“There’s so many great tools, but by far the biggest thing to me is the reporting capabilities. I can pull together a summary of billings or project hours in seconds. What used to take hours now takes minutes. CORE allows me to track where time is being spent, so I can stay involved in projects at a higher level. I’m not just a principal in name. I still get to design and engage with clients, instead of spending 10% of my week tracking numbers.”

Warren Lloyd, AIA
Founding Partner
Lloyd Architects

LEARN HOW CORE CHECKS ALL THE BOXES →