

Partner at Kansas City Firm Turns to Tabs3, Spends More Time Riding His Motorcycle

Executive Summary

Mission

- Accurately document communications, streamline billing, and provide lawyers with easy-to-access checklists to improve productivity and increase billable time.

Challenge

- Manual processes and isolated software systems forced the staff to recreate case checklists, and bills could not be easily reconciled against payments at the end of each month.

Roadblocks

- Existing billing and document management solutions did not offer sufficient capabilities.
- Lack of integration among existing systems required staff to re-enter information multiple times.

Solutions

- Tabs3 Billing—for easy time tracking, flexible billing options, and to deliver invoices to clients quickly.
- PracticeMaster—featuring case management, email linking, journaling, time tracking, document management, and case-load reporting.

Benefits

- Improves productivity so staff can spend more time providing legal services to clients.
- Automates data flows among various systems to eliminate the need for rekeying information.
- Documents communications with all third parties for each case.
- Allows attorneys, paralegals and other staff to easily enter billable time.
- Streamlines end-of-month billing reconciliation.
- Enables senior management to easily analyze billable time per resource and per client.
- Provides ability to customize checklists that attorneys use to manage case activities.
- Links case management to other databases so attorneys can quickly access important documents.



Compared to the other solutions we considered, Tabs3 Billing and PracticeMaster help us work more efficiently, and when we are more efficient, we can be more profitable. Both programs offer robust features and integrate with other software solutions.

Steve Quinn
Stretz/Quinn



The Challenge

> Documenting Communications and Streamlining Billing

The pace of work is fast at Stretz/Quinn. As a law firm that focuses on Workers' Compensation, most cases are relatively small in terms of the dollar amount, which means each of the firm's attorneys handle multiple cases every day. A lot of communication takes place with employers, court officers, insurance companies, healthcare providers, and opposing attorneys.

"We need to track every communication we send or receive, and we also need to closely follow our internal processes to ensure we cover all the issues pertaining to each case," says Steve Quinn, one of the firm's partners.

With the firm handling a large case load, billing and collecting payments is also a major concern. Documenting the billable time of attorneys and paralegals, and getting invoices out the door quickly and accurately is the lifeblood of the firm.

After initially investing in TimeSlips to handle time entry, the firm realized it needed more robust billing capabilities. "As our volume grew, the TimeSlips database sometimes experienced data corruption, requiring us to spend a lot of time manually processing invoices," says Quinn. "We also wanted to avoid inputting the same data in two systems. We needed a more tightly integrated process."

The Solution

> **Tabs3 Billing and PracticeMaster**

Stretz/Quinn took on these challenges helped by CyTek Corporation, the law firm's long-time and trusted partner for all IT services. Working closely with Judy Best, a Senior Application Specialist at CyTek, Quinn first tackled the billing issue. Best strongly recommended that Stretz/Quinn deploy Tabs3 Billing.

"Judy was right on the money," Quinn says. "Tabs3 Billing deployed quickly and is easy for our staff to use when it comes to time entry. Every month I can quickly close the books and run a series of reports to analyze our productivity, including total hours worked and billed."

With the billing process working efficiently, Quinn next turned his attention to case management. That's where Best recommended PracticeMaster, another software solution offered by, and integrated with, Tabs3. Quinn was drawn by the flexibility to customize the fields within each PracticeMaster form.

"Judy showed us how to customize the features of PracticeMaster, which make it easy to set up checklists for every different type of setting we handle," Quinn points out. "We can also insert links to our other databases and our document management system so we can access files immediately."

Quinn had either tried, tested or considered other law firm software solutions—including TimeSlips, Time Matters and Clio—but the choice of Tabs3 and PracticeMaster ultimately came down to how well the solutions meshed with the culture at Stretz/Quinn—where the focus must be on clients, and any software tools the firm uses must run seamlessly.

"Compared to the other solutions we considered, Tabs3 Billing and PracticeMaster help us work more efficiently," Quinn says. "And when we are more efficient, we can be more profitable. Both solutions offer robust features and integrate with other software solutions. And the ability to customize means we can adapt them to function just the way our team likes to work. That's a huge plus for any software—it ensures the solution gets used so our firm can fully realize the productivity benefits."

The Results

> Increased Productivity and Accelerated Billing

Besides Tabs3 Billing, PracticeMaster also integrates with Microsoft Outlook, the email system used by the firm. Client data input into Tabs3 Billing automatically flows into PracticeMaster, and the PracticeMaster calendar function automatically syncs with Outlook.

“We have a firm motto, Touch It Once,” Quinn says. “Shared information among multiple systems significantly improves our productivity. We no longer have to bounce back-and-forth between applications as much, and we don’t have to input data more than once.”

With the customized checklists that PracticeMaster allowed Quinn to create, managing cases is now much easier for the firm’s attorneys and paralegals. They know right where to go for each checklist, and they can make sure they miss no steps preparing for settings.

“We’re much more organized now,” Quinn emphasizes. “We don’t waste time recreating checklists, and we avoid putting a case in jeopardy by ensuring we don’t overlook an important step. It’s all right there in PracticeMaster so we can guide ourselves through each case.”

In addition to streamlining the billing process and making it easier to reconcile payments with invoices, Quinn values the level of security that Tabs3 Billing provides: “Previously, everyone in the firm who entered time had access to the entire billing and payment system. That presents the risk that someone might mishandle an invoice or a bill. With Tabs3 Billing, we can now limit the rights so that only the senior team has access to the entire system.”

In looking back on the success of Tabs3 and PracticeMaster, Quinn says, “We are a small firm—we move from month-to-month and take care of our customers. That’s where our focus needs to be. Our only criteria for software is that it makes our lives run smoother and more efficiently. Tabs3 Billing and PracticeMaster hit the target on this objective by making it easy to enter time and get our bills out quickly while also organizing the management of cases.”

Quinn is also quick to point out...“Despite my reputation in the Work Comp legal community as a bit of a computer geek, I don’t like computers—I like motorcycles. Tabs3 and PracticeMaster allow me to spend more time on my motorcycle, and that makes me happy!”

About Stretz/Quinn P.C.

Located in Kansas City, Missouri, Stretz/Quinn was founded in 1993 by Matt Stretz and Steve Quinn to establish a law firm dedicated exclusively to providing clients with cost-effective, yet aggressive, handling of Workers' Compensation litigation in Missouri and Kansas. The firm is staffed with highly-experienced litigation attorneys with over two hundred years of combined legal expertise. The depth of the firm's bench allows Stretz/Quinn to represent multiple clients simultaneously in various venues while still being nimble enough to respond quickly to client needs.

About CyTek Corporation

CyTek Corporation focuses on business solutions for small to mid-size law firms. Serving the Midwest for over 30 years, their experienced team of professionals deliver technology services that achieve results and a competitive advantage. For more information, contact Judy Best via e-mail at judyb@cytekcorp.com or by phone at (816) 471-3333.

About Software Technology, LLC

Software Technology, LLC, the maker of Tabs3 and PracticeMaster software, has been at the forefront of developing software for law firms for over 35 years. Tabs3 is one of the most widely used legal-specific time and billing products in the United States and has been an industry leader since its introduction in 1979. Tabs3 is designed to seamlessly integrate with PracticeMaster, a leader in practice management software. Among its many features, PracticeMaster provides an easy way for firms to create a firm-wide calendar, search for conflicts of interest, organize case and contact information, and manage email and documents. For more information, call (402) 419-2200, email sales@tabs3.com, or visit Tabs3.com.