

California Firm Leverages Tabs3 to Reduce Document Processing to Focus More on Clients

Executive Summary

Mission

- Reduce time lawyers and support staff spend on processing documents so they can focus more time on providing legal services to clients.

Challenge

- Integrate workflows—such as document management, billing and client communications—so the firm could work more efficiently.

Roadblocks

- Lack of integration between current software solutions.
- Inability to customize current software solutions to conform to the firm's unique business processes.

Solutions

- Tabs3 Billing – including modules for billing, general ledger, accounts payable, trust accounting, and practice management.
- PracticeMaster – the practice management module in the Tabs3 suite featuring email linking, journaling, time tracking, document management, and case-load reporting.

Benefits

- Lawyers and support staff now spend more time servicing clients.
- Case document processing time reduced by 33%.
- End-of-month billing cycle reduced from 21 days down to three days.
- Improved communications follow strict guidelines according to each client's requirements.
- The ability to customize forms to include the desired information for each client and each case.
- All information on clients and cases is immediately available to the entire firm in real time.
- A paperless office—documents are immediately scanned and turned into searchable PDF files.



The biggest benefit the Tabs3 solutions deliver is a major reduction in the amount of time our lawyers and our support staff spend on handling and processing case documents. They can now turn more of their focus towards helping our clients.

Cindy Fink
Michael Sullivan & Associates



The Challenge

> Integrate Workflows and Customize Document Management

When Cindy Fink joined Michael Sullivan & Associates (MS&A), one of her key objectives was clear. The Director of Operations wanted to help the firm integrate back-office workflows (accounting/billing) and front-office workflows (case document processing/client communications) so the firm could work more efficiently.

Achieving this objective would enable the firm's lawyers to focus more time on providing legal services to clients. The support staff, including paralegals and clerks, could also work more efficiently so the firm as a whole could generate billable hours while keeping within client-specific guidelines.

"We essentially needed to upgrade our office software to enable the entire company to complete various workflows more quickly," Fink says. "We wanted to avoid forcing the staff to chase down information manually, and we needed our systems to automatically flow data from one business process to another."

For document management, MS&A previously relied on TimeMatters, but the software could not be integrated with the firm's TimeSlips billing application. That meant the staff had to tediously enter client information twice, and conflicting information sometimes existed between the two systems.

Fink also wanted more flexibility to customize and add data fields within document forms. "As is the case with many law firms, we have our own unique way of processing case documents and handling billing," she explains. "We needed software with the basic business-process functionality for law firms along with the flexibility to configure documents and client communications to work just the way we want them to."

The Solution

> Tabs3 Billing and PracticeMaster

At a previous law firm, Fink became familiar with the benefits of two Tabs3 solutions she thought would also be ideal for MS&A:

- Tabs3 Billing, which makes it easy to send bills quickly via email PDF statements and task-based billing. This allows for using standard and custom rate billing options per client and per attorney.
- PracticeMaster, a practice management module in the Tabs3 suite that features email linking with Microsoft Outlook, journaling, time tracking, document management, and case load reporting.

In the course of performing due-diligence to analyze other possible options, Fink also considered Thomson Reuters Elite ProLaw, JurisDOC and Aderant. The Tabs3 solutions won out over all these options for their customizability and reporting capabilities. The ability to customize forms proved particularly helpful as MS&A expanded its legal services from workers' compensation and needed to create new forms for the civil and employment law practices that were added to the firm.

Fink also appreciated that Tabs3 gave an accurate assessment of what both PracticeMaster and Tabs3 Billing deliver. "There's sometimes a disconnect between what a vendor's sales team tells you and what their software can actually do," Fink explains. "With Tabs3, we knew exactly what we were getting, and both solutions met our expectations once we got into the training and deployment phases."

Playing a key role in the training and deployment was Judy Lassek of Legal Software Services, a Tabs3 deployment partner and a Tabs3 President's Circle Member. "We were able to do some of the setup configurations and merged documents on our own, but Judy played a huge role in the success of the overall deployment," Fink emphasizes. "She took the time to understand our business model and combined that with her knowledge of Tabs3 to advise us on the best way to leverage PracticeMaster and Tabs3 Billing. She has been an ongoing resource to help further develop customized work flows based on our legal areas of practice. Working with a knowledgeable consultant has enhanced our operations."

Another key player in the success in the further development and deployment of the Tabs3 solutions was MS&A Operations Manager Mike Evert. He assisted by training the firm's lawyers and employees (approximately 165 personnel in all) across nine offices. Evert also configured many of the document workflows, which has helped eliminate a lot of manual intervention for the overall staff.

The Results

> More Time to Practice Law and Accelerated Billing

“The biggest benefit the Tabs3 solutions deliver is a major reduction in the amount of time our lawyers and our support staff spend on handling and processing case documents,” Fink says. “They can now turn more of their focus towards helping our clients.”

Fink estimates that the amount of time spent by support staff in helping each lawyer process paper work has been reduced by 33%. This has enabled management to re-evaluate staffing needs and adjust accordingly. The billing process has also been significantly accelerated. With PracticeMaster and Tabs3 Billing closely integrated, the end-of-month billing process was reduced from 21 days down to three days.

“The impact of the Tabs3 solutions extends across the entire firm,” Evert points out. “Even the human resources department taps into the merged documents in PracticeMaster when they need letterhead to send out an offer to a prospective employee.”

Each MS&A client has different requirements for the way the firm handles cases, communicates information, and processes bills. Keeping each client’s preferences straight used to require a lot of manual work, forcing the staff to double check spreadsheets and email alerts on every client that went out to everyone in the firm.

“But all that information is now efficiently uploaded, stored and tracked in PracticeMaster and Tabs3 Billing,” Evert says. “Any updates occur instantaneously for the entire firm to see, and we’ve created short cuts to reports that everyone can see in real time. This helps demonstrate to our clients that we communicate effectively and handle cases the way they want us to.”

Another example of the payoff of the Tabs3 software suite is how MS&A has turned into a paperless office. The mail for the entire firm now comes into a central office where it’s scanned into PDF documents that lawyers and their support staff can view in PracticeMaster.

“We now scan everything,” Fink says. “That allows us to turn every document into a searchable file so that our lawyers can immediately access anything they need to process a client case. PracticeMaster tracks everything we need to know on every client—and that’s a big plus in helping the firm operate at a higher level of efficiency.”

About Michael Sullivan & Associates

Founded in 1996, Michael Sullivan & Associates has continued to grow over the years and currently has nine offices throughout California, with hundreds of clients and a talented group of partners and associates. Robust civil and employment law sections have been added to the firm's initial workers' compensation practice, allowing MS&A to become a full-service firm for California employers and carriers.

About Legal Software Services, LLC

Judy Lassek launched Legal Software Services in 1996 to provide software solutions to the legal industry. As a consultant and a trainer, Lassek specializes in billing and document management. She is also a Tabs3 President's Circle Member and certified on all Tabs3 products as well as Worldox. Prior to launching Legal Software Services, Lassek worked at Software Technology, LLC. as a conversion programmer for Tabs3, and she earned her Computer Information Systems degree from Arizona State University.

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.