Tabs3
Reliable Software. Trusted Service.

How Humphrey Law Office
Increases Productivity and Service to Clients

Executive Summary

Mission

- Increase productivity and time spent on providing legal services to clients.

Challenge

- Identify the right software to help run accounting, financial, and document management functions more efficiently.

Roadblocks

- Several previous software solutions failed to meet the requirements.
- Technical support to utilize the solutions effectively insufficient.
- Billing process took up to 3 days per week.

Solutions

- Tabs3 Suite – 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

- Reduces billing process time to 30 minutes.
- Integrates seamlessly with Worldox, HotDocs, Adobe, and Microsoft Office.
- Streamlines calendaring, document assembly, reporting, conflict checking and case tracking.
- Enables fast system backups during which time end users can keep using the system.
- Tracks file versions and facilitates searches for past emails and documents such as pleadings.
- Provides technical support to enable staff to capitalize on all system features.

> *Compared to our past experiences, partnering with Tabs3 makes us feel like we're in a whole new world. Every day offers new opportunities to provide better service. Every time we try something new with the software, we are surprised—and that's because Tabs3 and PracticeMaster work so efficiently with very little effort on our part.*
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> ***Bonnie Humphrey***
> ***Humphrey Law Office***

The Challenge

> **Identify the Right Software to Increase Productivity and Provide Better Service to Clients**

After many years in the public sector, Bonnie P. Humphrey opened the Humphrey Law Office in 2005 and established her professional corporation in 2010. She quickly discovered the challenges of operating the business side of a law office. For the office to run profitably and efficiently, the accounting, financial, and document management functions all required more attention than she anticipated as a previous public service attorney.

"Over the course of nine years, we went through several different law software solutions that offered billing, practice management, and general ledger capabilities," Humphrey says. "But we could never get them to work quite the way we needed, and the systems frequently crashed. There was a definite 'failure to launch' problem on the software providers' end. They did not seem to care about anything but making the sale, and support after that was hit-and-miss. With one provider, we would wait three weeks for a return phone call after spending thousands of dollars trying to make their program work. With another, we spent hours and hours of billable time trying to get issues resolved, with no definitive results or end in sight."

Issues in particular that drained Humphrey's time included failing system backups and integrations with applications such as HotDocs, Adobe, and the Microsoft Office suite. "We spent an inordinate amount of time training and learning how to use all three systems," Humphrey says. "We also invested a lot of money with consultants who tried to get the systems to work, and we spent a lot of time talking to vendor support teams. This took away from our focus of providing legal services to our clients."

Things came to a breaking point in 2014 when one of the software providers insisted on moving all of the firm's applications to the cloud and offered to manage everything for the office. The Humphrey Law Office staff spent approximately 20 hours each week trying to get the new process to work, despite continued failures, thinking this would finally be the solution that would allow more time for actually practicing law.

The onboarding process was awkward, updates were not performed on time as promised, the service continued to perform poorly, and gaining access to the applications worked sporadically. The provider also refused to move the applications from the cloud back to the office's server.

"That's when we knew we had to find an alternative solution," Humphrey says. "We just wanted a software partner who actually kept their promises, who would treat us professionally, and who would provide a streamlined solution that would work, not keep us up worrying at night and costing thousands of dollars for no results. That's when I called Affinity Consulting Group to ask for help. "

The Solution

> Tabs3 Software Provides All the Functionality the Law Office Requires

Affinity Consulting Group specializes in strategic technology and management solutions for law firms of all sizes. The company customizes solutions according to what law offices need, instead of force-fitting software. Rather than suggesting just one solution, Affinity demonstrated three solutions and explained in detail how each one would work with Humphrey's specific needs and desires to find the best fit. As Affinity talked Humphrey through each solution, the Tabs3 software suite clearly stood out from the others.

The Tabs3 suite includes modules for billing, general ledger, accounts payable, trust accounting, and practice management. PracticeMaster, the practice management module in the Tabs3 suite, features email linking with Microsoft Outlook, journaling, time tracking, document management, and case load reporting, among other features. The Tabs3 suite integrates easily and seamlessly with QuickBooks, Worldox, HotDocs, Adobe, and Microsoft Office.

"Given that we went through a side-by-side comparison—along with our past software experiences—we could see Tabs3 providing all the capabilities our law office needs for managing the practice," Humphrey says. "This includes calendaring, document assembly, reporting, conflict checking, tracking cases that had become 'stale' and handling all the accounting aspects."

The next thing Humphrey did was call Tabs3 personally to quiz them in detail about their technical support options. She asked all the tough questions, and they passed every test. Affinity Consulting then assisted Humphrey Law Office with moving over ten years' worth of data to the Tabs3 software solution.

With the software deployed onsite, Humphrey was impressed with the fact that the integrations are consistent and "just work." By purchasing the Platinum level of Tabs3 software licenses, the staff also has the ability to access Tabs3 and PracticeMaster data from their laptops and smartphones securely via the internet when working out of the office. Any work completed remotely automatically syncs to the software back at the office without a glitch in sight.

"We also have the option of moving all the applications back to the cloud if we want to in the future, on our own terms," Humphrey adds. "It's good to know Tabs3 gives us the flexibility to interact with their software in the way we prefer. They don't force us to use it in a certain way like our previous providers."

Humphrey likes the Tabs3 option so much that she did not even give a thought about using anything else for billing. "Tabs3 appreciates how valuable our time is, and they provide information regarding crucial updates in a way we never had before," Humphrey explains. "That is a real plus, to know that they are putting their customers first, and they do a great job with software maintenance updates in between versions. Tabs3 has an overwhelming majority of clients who they update regularly and keep on maintenance schedule because of their thoughtful, careful, and concise software support, no matter what size law office is maintained."

Another factor that Humphrey appreciates is how well Tabs3 and Affinity have worked together in developing and supporting the Tabs3 suite. "They both want to see us succeed, and the combination of Affinity's expertise with the solutions offered by Tabs3 is a winning formula. Further, they frequently reference each other as supportive, professional personnel."

The Results

> **More Time Now Available for Providing Legal Services**

After more than two years into the deployment of the Tabs3 solution, the software has performed flawlessly. "Thanks to Tabs3, we can now focus our time on providing legal services and taking care of clients," Humphrey says. "And that's the way it's supposed to be! Further, there is a noticeable and distinct dip in the amount of time spent backing up the software, calling for support or service, and general maintenance on our part. It's simply seamless, and the Tabs3 staff is so professional."

Whereas the billing process previously required about one to three days of time to complete each week, Humphrey Law Office can now accomplish the same task in about 30 minutes using Tabs3 software. The number of support calls has also shrunk considerably. "With one of our past vendors, we were on the phone almost every day," Humphrey reveals. "But with Tabs3, we have called less than 10 times in two-and-a-half years, and some of those calls were to thank them for not having to call for support! When we do call, they always respond right away and resolve questions quickly." Maintenance updates are also seamless and well-worth the cost.

Humphrey particularly appreciates the HotBackup feature that Tabs3 software offers with Platinum. She used to spend nearly one hour every day trying to get backups to run, but now it's a simple point-and-click process if she chooses to run a quick backup during the day. Backups complete in about two minutes (with over 10 years of data), and the staff can keep working in the software while the backups execute. There is also an automatic backup feature, which runs every evening, flawlessly, and without involvement.

The staff at the law office has found the software suite very easy to learn. As part of the software's numerous help resources, Tabs3 provides videos that walk end-users through every step of a process. "From the perspective of the legal services we provide to our clients, PracticeMaster is a huge help in checking for client conflicts of interest," Humphrey adds. "We can easily search our database for anything we have done in the past, such as a pleading, a linked email, or other document that has been linked into the software, including those we receive from other law firms."

PracticeMaster makes it easy for Humphrey and her staff to track different document versions, preview documents, and change them on-the-fly before printing. "We are amazed by what we can do—we're still discovering new capabilities," Humphrey says. "It's also great for confirming changes in documents with opposing counsel and clients to confirm understandings."

Clients also appreciate the information Humphrey can now provide on their accounts and documents. "We actually look at screens together with clients," Humphrey reveals. "Tabs3 and PracticeMaster present information in an easy-to-read format, and sharing the screens helps clients see we are doing the best we can to represent them in a professional, caring, transparent and thoughtful manner."

"Compared to our past experiences, partnering with Tabs3 makes us feel like we're in a whole new world," Humphrey concludes. "Every day offers new opportunities to provide better service. Every time we try something new with the software, we are surprised—and that's because Tabs3 and PracticeMaster work so efficiently with very little effort on our part. We also appreciate the Tabs3 team's professionalism when working with our office, and it is obvious that Affinity believes strongly in their solution for law offices. Tabs3 always treats us as an important client, even though we are a smaller office, and we appreciate that every single day."

About Humphrey Law Office, P.C.

Humphrey Law Office, P.C. is a private practice based in Minot, North Dakota that also provides legal services to clients in Minnesota. The law office represents clients with legal matters relating to divorce, separations, parenting, residential responsibility, modifications, judgments, order enforcement, child support, adoption, interstate enforcement and modification, collaborative law, guardianship, and children's issues, as well as mediation and working in other types of law such as estate planning. Humphrey Law Office, P.C. is led by Bonnie P. Humphrey, who developed her unique style as a hands-on attorney after many years of exploring what works best for clients overall, what gives them the best understanding of the legal system, and what solutions actually work over the long haul for clients and their families.

About Affinity Consulting Group

Affinity Consulting Group was founded by a group of legal IT and management consultants with a collective 135 years of legal experience. The firm specializes in strategic technology and management solutions for law firms and legal departments of all sizes. Uniquely positioned—via decades of experience as attorneys, law firm administrators, paralegals, law firm trainers, and legal IT—Affinity consultants have worked with law firm clients since 1998 on technology audits; strategic business & management assessments; technology selection and implementations; traditional and cloud-based financial practice management; litigation support and trial preparedness; and in-house training and professional development.

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.