

30 Years and Counting— Efficient Attorney Time Tracking and Invoicing Using Tabs3

Executive Summary

Mission

- Help attorneys work more efficiently so they can spend more time providing legal services and securing new clients.

Challenge

- Accurately track the time of attorneys and other billable resources, and generate invoices and management information while also making it easier to manage court calendars and court document submission requirements.

Roadblocks

- Finding a cost-effective solution that could grow as the firm grows.
- Software solutions must provide flexibility to be rolled out on a phased approach, one office at-a-time.

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, case-based calendaring, document management, and case-load reporting.

Benefits

- Attorneys can easily enter billable time for each client, ensuring all billable time is invoiced.
- Stores all data in centralized hosted cloud, which helps facilitate profitability analysis and reporting.
- Allows partners to view time by lawyer, client, office, and by practice.
- Enables partners to analyze the realization rate of each lawyer.
- Gives lawyers at-a-glance views of when they are due in court and due dates for document filings.
- Permits lawyers and paralegals to submit time and view calendars remotely.
- Creates flexibility to adapt to each client's requirements for how invoices are set up.



“Tabs3 Billing and PracticeMaster allow our attorneys to work more efficiently so they can spend more time on providing legal services and securing new clients. Every client has different requirements for billing and Tabs3 gives us the flexibility to adapt to clients’ wishes.”

*Jim Therien
Ericksen Arbuthnot*



The Challenge

> Deploy Technology Statewide While Accommodating Individual Office Needs

Each of the six Ericksen Arbuthnot litigation offices in California is run autonomously by the partners who head up their respective teams of attorneys, paralegals, and administrative support. When deploying new software solutions, Jim Therien—the Controller and Firm Administrator for the firm—needs the flexibility to roll out the technology according to each office's preferences and needs.

"We access our software from a hosted data center in the cloud, and the partners at each office decide the extent to which they want their end users to utilize the applications," Therien explains. "In addition to needing flexible software licensing that can grow according to when each office decides to implement solutions, we also need help in training end users on a phased approach, one office at a time."

One of the early challenges Therien took on when joining Ericksen Arbuthnot in 1986 was centralizing the tracking of time and generating invoices for lawyers, paralegals, and other billable resources: "Making sure we bill for all the hours of legal services we provide and tracking realization rates are important keys to profitability," Therien says. "With the firm growing quickly, we wanted to centralize our billing function to give us the ability to proactively identify and manage where we needed to make adjustments for any time that was unbilled, or for any matters that were not generating their expected hourly rates."

Another challenge faced by Ericksen Arbuthnot was the ability to track lawyer calendars, and to have their schedules coordinate with the local rules of courthouses throughout California. Courthouses have varied schedules of hours as to when cases are adjudicated along with unique requirements for handling document filings. The firm wanted to make sure lawyers and their admins could easily set schedules according to when they needed to be in court, and to help them stay on top of the deadlines for submitting documents.

The Solution

> Tab3 Billing and PracticeMaster

Therien identified Tab3 Billing as the solution to the firm's time tracking and invoicing challenge. In addition to the software's ability to make it easy for lawyers to track their time and speed up the invoicing process, Therien recognized the superior support Tab3 could offer to help the staff learn how to use the software. By deploying Tab3 in 1987 and continuing to use the product today, Ericksen Arbuthnot is one of the longest-running Tab3 clients.

"Any time we call for help to produce new information, Tab3 is very responsive in showing us which reports will generate what we need," Therien says. "One of the greatest values we derive from Tab3 Billing is the information that the reports produce. This allows us to analyze what we bill our clients so we can evaluate the profitability of each of our timekeepers as well as individual matters."

"Our long-standing relationship is a testament to the type of company Tab3 is and the type of people they employ," Therien adds. "Across the board, senior management as well as the software developers and the customer service team include people who have been there for an extended time. They are all accountable and show passion for continuously innovating their solutions."

After solving the time-tracking and invoicing challenge with Tab3 Billing, Therien turned to Tab3 again when it came time to address the calendar and docket challenges. PracticeMaster was deployed so that attorneys could manage their court schedules efficiently. PracticeMaster also allows attorneys to set their schedules according to the local rules of individual courthouses.

Playing a key role in supporting both Tab3 and Practice Master is Bill Baker of Baker+Cadence Solutions, which provides technology to law firms and corporate legal departments. Baker has assisted Ericksen Arbuthnot in utilizing both solutions more efficiently by helping customize fields according to the specific needs of Ericksen Arbuthnot.

"Bill works well with everyone across all levels of our firm," Therien says. "He also understands our business model and what we need from Tab3 Billing and PracticeMaster. Perhaps most importantly, Bill knows how to focus on training end users on the functions that matter most and not overwhelm them with additional functions they don't need."

The Results

> Flexible Time Tracking

By deploying Tabs3 Billing, Ericksen Arbuthnot provides its attorneys and other personnel with the ability to easily enter billable time for each client they serve. Some offices have their attorneys enter time directly while other offices rely on an admin to enter time. All the data is automatically uploaded to the centralized Tabs3 Billing software hosted in the cloud.

Therien particularly appreciates the flexibility in the different ways the firm can generate reports. “We can analyze realization rates, for example, by office, by cost center, by client, or by law category,” Therien points out. “This is key because what we bill per hour is not as important as what we realize after client appeals and adjustments.”

With PracticeMaster, lawyers know at-a-glance when they are due in court and when document filings are due. “Given that our lawyers handle cases in multiple counties across the state, this is a key benefit,” Therien says. “Each lawyer and their support team know where and when they need to be and when to submit paperwork to the courts to support their cases.”

By deploying a third Tabs3 solution, Tabs3 Connect, Therien has given lawyers the option to interact with Tabs3 Billing and PracticeMaster remotely. This is particularly helpful when lawyers are on the run and need to quickly check their schedules or submit billable time for a client.

“Tabs3 Billing and PracticeMaster allow our attorneys to work more efficiently so they can spend more time on providing legal services and securing new clients,” Therien concludes. “And Tabs3 is very attentive to our requests. If we need help, they respond quickly, and when we suggest changes to the software, we typically see those changes in the next release. They know our industry is not static and that every client has different requirements for billing. Tabs3 gives us the flexibility to adapt to clients’ wishes.”

About Ericksen Arbuthnot

Since 1950, Ericksen Arbuthnot attorneys have handled transactional and litigation matters for clients locally and nationally. The firm's six law offices cover all 58 counties in California, providing local knowledge of courts and judges. Ericksen Arbuthnot understands the variations in jury pools in different parts of the state and which expert witnesses clients are likely to encounter. Specific firm practice areas include alternative dispute resolution, appellate, business transactions, construction, employment, healthcare, insurance coverage, personal injury, products liability, professional liability, real estate, toxic tort, and workers' compensation. For more information, visit www.ericksenarbuthnot.com.

About Baker+Cadence | Solutions

Founded in 1997, Baker+Cadence Solutions provides a full range of technology solutions and related services to law firms and corporate legal departments. The firm serves as a highly-valued partner and trusted resource to clients for software applications, network services, training and support. With offices in both northern and southern California, Baker+Cadence Solutions has more than 600 law firm and corporate legal department clients. The client base ranges from the western United States including Hawaii and Alaska to over 40 clients in Canada. The company has been continuously selected as a President's Circle member by Software Technology, the providers of Tabs3 and PracticeMaster solutions. For more information, visit www.bakercadence.com.

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.