

Criminal Defense Firm Deploys Tabs3 to Streamline Workflows, Improve Profit Tracking

Executive Summary

Mission

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

Challenge

- Existing software systems were not integrated and did not provide sufficient functionality. Attorneys were unable to access their calendars from the courtroom to tell the judge if they were available for the next proposed court date.

Roadblocks

- Finding a single-vendor solution to cover all workflow needs—from document management to bookkeeping, billing, trust accounting, accounts payable and general ledger.
- Identifying an implementation partner to customize and train the internal staff.

Solutions

- Tabs3 Billing - for easy time tracking, flexible billing rate options, and to deliver invoices to clients on a regular basis.
- PracticeMaster - featuring email linking, journaling, time tracking, document management, and case-load reporting.

Benefits

- Streamlines document sorting, searching and saving (regardless of type).
- Enables billable time to be entered directly to client accounts and directly from documents, calendar entries, journal entries, emails or notes.
- Cuts down on paper waste by creating PDFs of documents and notes within client profiles and making it easy to save directly from the desktop scanner to PracticeMaster.
- Allows lawyers to connect remotely to access client information, research and court documents.
- Facilitates billable time-entry and report-generation to forecast cash flow.
- Guarantees that trust accounts are Florida Bar compliant and makes trust account ledger keeping easily accessible at the push of a button.

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*Tracey Keppel Pumphrey
Pumphrey Law*

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The Challenge

> Modernize Back-Office Software to Improve Staff Efficiency

When Tracey Keppel Pumphrey came on board as the CFO at Pumphrey Law, she realized immediately that the firm needed to evolve several of its back-office processes. This included billing, document and case management, and the way the firm managed lawyer calendars.

At the time, the firm relied on a combination of TimeMatters, QuickBooks and manual processes. Keppel Pumphrey hoped to automate as many processes as possible so lawyers and support staff could function more efficiently.

"We wanted to make it easy for attorneys, law clerks and paralegals to capture their billable time, and keep each other up-to-date without the necessity of email updates to the team," Keppel Pumphrey adds. "When meeting with a client, we wanted any attorney within the firm to know at a glance exactly what had occurred in real-time since the client was last updated. And we hoped to gain the ability to run reports to verify profitability on hourly cases vs. flat-fee cases."

Another key challenge Keppel Pumphrey hoped to solve was to streamline the process for the firm to continue to maintain its bar compliance with respect to trust accounts. This included the need to generate detailed client ledgers and fail-safe methods for correctly capturing trust costs and deposits.

"It was essentially time to modernize the software that runs our business," Keppel points out. "Doing so would allow us to focus more time on providing legal services to clients and also help us operate the firm in a more organized way and a more profitable manner, which ultimately saves the client money and also gives the attorneys more time to work with a larger case load."

The Solution

> Tabs3 Billing and PracticeMaster

As Keppel Pumphrey identified these challenges for the firm, she already knew what the answer would be—Tabs3 Billing and PracticeMaster for document and case management. Keppel Pumphrey had previously worked for a large insurance defense law firm that relied on these solutions, and she knew that the Tabs3 software had the ability to easily enter the litigation and transaction codes necessary for insurance company billing requirements. Tabs3 and PracticeMaster would therefore easily work well for the Pumphrey Law Firm, even though it's a much smaller law firm.

Keppel Pumphrey then convinced the partners that Tabs3 and PracticeMaster represented the new technology direction the firm needed to take in order to streamline document management and billing.

"PracticeMaster met all of our challenges," Keppel Pumphrey says. "It's very-friendly and customizable to our specific needs so we can increase our time-efficiency. The software also enables us to synchronize multiple calendars, and the cross-relational database abilities make calendaring a breeze, even remotely through hand-held devices and tablets."

Keppel Pumphrey was also approached by other financial software and document management companies, but none compared favorably: "Tabs3 offers a single integrated solution with modules that cover document management, bookkeeping, billing, trust accounting, accounts payable, and general ledger," says Keppel Pumphrey. "That makes Tabs3 the Ferrari of law firm software—but without huge upfront costs and expensive annual maintenance fees."

Keppel Pumphrey also emphasizes the key role played by Jim Degnan at CompassPOINT Legal, a Tabs3 deployment and training partner and a Tabs3 President's Circle Member. "We highly recommend CompassPOINT for Tabs3 implementations and training," says Keppel Pumphrey. "They take a unique approach to training. Jim asked about our specific practice and what we needed from the program, and then tailored the training to meet those needs. In addition to customizing the interface for each of our practice areas, he also provided detailed in-house training to our whole team."

The Results

> More Efficient Workflows and Improved Profitability Tracking

The PracticeMaster document management component is among the best Keppel Pumphrey has seen. The solution makes it easy to sort, search and save all documents (regardless of type), and send billable time directly to clients with a simple click. This eliminates the need for multiple screens, devices and handwritten notes—a big boost to staff productivity.

"PracticeMaster also cuts down on wasting paper," Keppel Pumphrey adds. "We no longer have to prepare bulky notebooks for meetings, depositions and trials. We just save PDFs, emails, reminders, tasks, and notes directly to each client's PracticeMaster profile, which then provides us with case-specific details that are word-searchable and sortable by document type."

The ability to connect remotely via the Tabs3 Connect module while out of the office or in court makes accessing client information, research, documents and billing records an indispensable tool for all of the firm's attorneys. Within Tabs3 Billing, it's easy for lawyers and the staff to enter billable time (even remotely), and Keppel Pumphrey can then easily run reports and pre-bills to forecast cash flow.

When Keppel Pumphrey first joined Pumphrey Law, the firm mainly issued flat-fee bills. But since deploying the Tabs3 solutions, she can now set up clients as hourly and change the billable rates depending on the client and the resource providing the legal services. "We also now bill on a regular monthly cycle," Keppel Pumphrey adds. "We track flat-fee clients on payment plans and enter payments on a daily basis. We can then quickly send them a statement that same day, which also captures how much they have left in their trust accounts so they'll know if it's time to replenish. We can also now accept credit card payments more quickly and easily."

Pumphrey Law works with many repeat clients for which PracticeMaster makes it easy to assign new matter numbers so lawyers can track all their cases but not combine matters. The attorneys can easily pull up each matter to see the next calendar dates, if any documents have come in, how much the client owes, and the money in their trust account. This helps the firm know if client accounts have enough to pay expert witnesses and cover other case costs at a glance without having to contact their billing department to answer those questions.

"The trust accounting module is one of the best things Tabs3 has to offer," Keppel Pumphrey emphasizes. "It's Florida Bar compliant and won't let the user write a check unless the client has the funds in their account. The software also allows for us to print the client a detailed trust ledger at any time to account where their funds have gone and the details regarding those costs and fees."

From an overall standpoint, Keppel Pumphrey says that thanks to Tabs3 and CompassPOINT, the entire firm works more efficiently: "The additional customization that Tabs3 offers will also enable us to become even more efficient over time. And that efficiency gets passed onto our clients, who are pleased to receive efficient legal services and timely billing."

About Pumphrey Law Firm

Based in Tallahassee, The Pumphrey Law Firm fights to protect clients charged with felony, misdemeanor and DUI offenses. The firm is led by Don Pumphrey, a former prosecutor who has devoted his career to representing individuals charged with criminal offenses by attacking prosecution cases piece-by-piece. All of the firm's attorneys understand the Florida criminal justice system and fight criminal accusations aggressively at every stage of the case.

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.

About CompassPOINT Legal

Based in Jacksonville, CompassPOINT offers decades of combined expertise in helping law firms of all sizes and practice types navigate the complicated realm of legal technology, financial/billing processing, and practice management. The firm provides top-level support for law firms nationwide and currently supports firms in 10 different states. Practice areas include cloud, IT, software deployment, training and consultation. Jim Degnan can be reached by phone at (904) 483-3481 or e-mail at jdegnan@compasspointlegal.com.