LAW FIRM CLOUDTECH TRANSFORMATION

Seamless Vendor/Consultant Collaboration

CASE BRIEF

FIRM SIZE: 35 attorneys
15 staff

ISSUE: Multiple legacy non-syncing software systems.

SOLUTION: Customized all-in one platform that can be used 24/7 from anywhere.

3545 Consulting

Litigation Firm Implements Unique Integrated Cloud Platform Solution Via Innovative Tech Partnership

Silverman Thompson Slutkin & White, LLC is a widely regarded litigation law firm in the Baltimore-Washington metropolitan area. The firm's 50-member staff consists of 35 of the area's top lawyers with diverse backgrounds, including former state and federal prosecutors, a retired federal judge, a retired state supreme court judge, and a law school dean. Andrew Slutkin, senior partner and head of IT at the Firm, recently spoke about his experience moving from the inefficiencies of three separate legacy software platforms to an integrated cloud-based case management, billing, and accounting platform solution through the collaborative efforts of 3545 Consulting Global and Zola Suite.

The Challenge

Silverman Thompson had long used three disparate server-based systems to handle case management, hourly time-tracking and billing, invoicing, and accounting. These legacy systems did not interact with each other. The Firm's case management system was an outdated version that lacked many features of today's case management programs (i.e. intake tracking and on-line access to files and documents). Additionally, the Firm's case management calendar feature did not reliably sync with Outlook, and its time-tracking and billing software did not have the option to enter time remotely.

Because of these technical limitations, staff manually reentered data into multiple systems, which was time-intensive and inefficient. Additionally, attorneys often experienced difficulty trying to record time outside of regular work hours, or when they were off-site, which meant that billable time was not being fully captured for case management purposes. Attorneys also found it challenging to access case files and documents remotely.

The Firm desired an all-in-one solution that could handle everything from on-boarding and intake to case management, time recording, billing, accounting, and CRM, efficiently and effectively.

Identifying Technology Needs and Objectives

As the project manager, Slutkin was tasked with identifying and selecting a solution that could essentially replace the three, legacy systems with an all-in-one platform. He evaluated several different solutions and realized that moving to a cloud-based system was how the firm needed to proceed. However, he knew that whatever he selected ultimately had to adapt to the needs of a a broad-based litigation practice and provide ease of use for the Firm's end-users.

After reviewing several products that included modules for case management, hourly billing, invoicing, and accounting, Slutkin asked his long-time IT contractor for a recommendation.

Deciding On the Right Solution and Implementation Partner

The Firm's IT provider recommended Zola Suite. In turn, Zola Suite recommended 3545 Consulting to act as the implementation partner and the technology intermediary between the Firm and Zola Suite.

3545 Consulting Collaborates with Zola Suite to Ensure the Firm's Goals Were Met

3545 Consulting brought 30+ years of expertise in the legal services sector, as well as specific expertise with Silverman Thompson's previous case matter management and billing software programs-- Needles and Timeslips. This product knowledge was essential to helping Zola Suite identify particular needs and data, and allow the Firm to continue to follow best practices for billing and accounting.

3545 Consulting created a road map for Zola Suite and worked with them to develop the customized PI module, which was unique to this project. This module needed to track expenses that the Firm did not directly incur, including Personal Injury case-related hospital/medical expenses. These costs needed to be tracked along with, but separate from, the Firm's expenses and used to accurately produce a Settlement Statement for each PI matter.

"3545 Consulting provided a major value-added service to the entire process," Slutkin said. "In terms of converting our data, providing training to our staff, and working with Zola Suite to customize a solution for us, 3545 Consulting hit the mark on all of these."
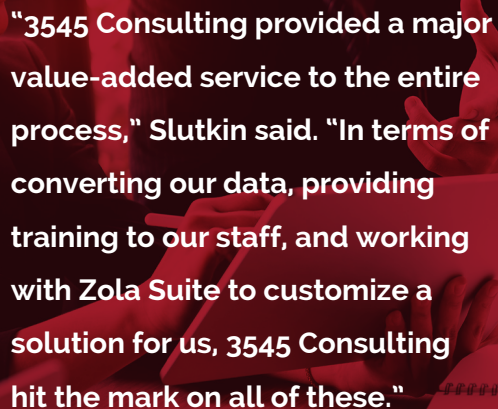
Working together, 3545 Consulting and Zola Suite designed and implemented a customized solution tailored to Silverman Thompson's unique practice-related needs. It took less than four months from the software selection stage to implementation with trained users.

Biggest Gains Post-Implementation

As a result of the Zola Suite implementation, Silverman Thompson has realized some impressive ROI. The Firm now has one platform that handles what previously required three separate programs (case management, hourly billing and invoicing, and accounting) to handle. There is great efficiency in the office, and staff can now rely on their on-line calendars. Attorneys also can access files remotely, on their phones and tablets, and they can enter their time after hours from their phones.

With Zola Suite's timekeeping capabilities, attorneys are entering more of their time, which makes recording billable hours more accurate and efficient. Previously, attorneys could not enter time after office hours, so the Firm was missing a significant amount of attorney-billable hours.

Zola Suite also has a CRM component that allows the Firm to track a potential new case and ensure follow-up... something they couldn't do before. The Firm is opening more cases as a result of the Zola Suite CRM features.

Conclusion

The team at 3545 Consulting attributes the success of the implementation to the close collaboration with the Zola Suite team.

Nancy Griffing, CEO 3545 Consulting Global says:

"Whether it is a creative brainstorming session, user experience discussion, or technical troubleshooting, the Zola Suite team was always there beside us."

Andrew Slutkin said it best:

"While Zola Suite is an excellent solution for us, 3545 Consulting was the partner that made the entire customization, migration, and implementation process so successful. They did a phenomenal job; they were there when we needed them, and they had answers for every question we asked. 3545 Consulting was the intermediary between us and Zola as we got up to speed and then ensured we received the training we needed to get the entire firm on board."

3545® Consulting

To learn more about 3545 Consulting Global call 713-789-3323.