

The original All-in-One®  
Software Suite for Case and  
Financial Management



Case Study

## Melli Law, S.C. streamlines its office software technology into an All-in-One® system

In addition to being home to UW-Madison, a nationally recognized university, and the Wisconsin Badgers, one of the teams of the Big Ten Conference, Madison, Wisconsin is also the location of Melli Law, S.C., which recently celebrated its 50<sup>th</sup> anniversary in 2008, the same year the firm was named “Best Employment Law Firm” by *The Best Lawyers in America*. Representing clients statewide in management-side labor and employment law, Melli Law has also established practice in the areas of construction, litigation, business, real estate, estate planning and school law.

Over the years, Melli Law managed its practice workflow by implementing several programs for various areas. After evaluating their internal applications, the firm realized its time and billing program was outdated and did not work well with the other two applications currently in place at the firm. Therefore, the firm decided it was time for a change. The decision to upgrade was not taken lightly and required the due diligence of Melli Law’s firm administrator, Tracey Reams, CLM, to research and evaluate available software packages before finalizing a decision to upgrade.

### The Software Selection Process

The research phase was time consuming and frustrating. Listening to each salesperson’s claim of superiority of their product’s features over those of the competitor, Reams and the partners from her firm found it difficult to objectively evaluate the software on its own merits. Fighting her first instinct to throw all salespeople in one room for a debate, Reams chose to utilize her membership in the Association of Legal Administrators (ALA) and access one of the available technical forum resources to conduct a little research. After performing a search on “PerfectLaw”, she decided to contact administrators both considering and those already using the product. After several telephone conversations with these administrators and viewing a demonstration, the firm decided PerfectLaw® was the right solution for their firm.

**PERFECTLAW®**  
ALL-IN-ONE® SOFTWARE

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There were several factors that ultimately led to the firm's decision to select PerfectLaw®. PerfectLaw® provided the updated application and resources the firm initially sought. This, accompanied by the ease of use, intuitive interface, and workflow added to the benefits offered. However, Reams found PerfectLaw's All-in-One® database to be the most critical factor. Rather than use three programs for their law firm workflow, all steps could be accomplished with PerfectLaw's single application using one database for both their financial and case management needs with information entered once and readily available to everyone within the firm.

## Implementation

Now that Melli Law purchased PerfectLaw®, the next step was software implementation. Despite Reams' 20 years experience in the legal industry, the transition to PerfectLaw® was her first encounter with a major software conversion. After hearing horror stories and knowing three existing software systems required a conversion into

**"I was very impressed at the 'well-oiled machine' as we prepared for the conversion, as the data was actually converted, and then by the pre-training, installation, onsite training and follow-up support."**

one database, Reams prepared for the nightmare. Luckily, PerfectLaw® has used feedback from thirty years of experience to streamline the installation process and provide the necessary guidance clients have come to expect.

A successful installation requires thorough communication and planning. With Reams leading the implementation team for firm requirements, a PerfectLaw® installation team was assembled with designated team members assigned to case management areas (front office), accounting and financial management areas (back office), and conversion. A pre-installation

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**"I would recommend PerfectLaw® All-in-One® Software to any firm looking for a way to manage its time/billing, accounting, case management and document management needs. The company knows the industry well, and its people are awesome!"**

**- Tracey Reams, CLM, Firm Administrator, Melli Law, S.C.**

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call was scheduled where details regarding requirements, expectations, deadlines, assignments and other details were reviewed and discussed. The PerfectLaw® installation team took the time to understand the firm's processes and made suggestions based on their needs. Since training is a critical element of a successful transition to new software, PerfectLaw® also provided pre-training/installation resources which included instructional videos and a demo "play" area.

Introductions were made, pre-training tools provided, demo area established, and a schedule with deadlines coordinated; all in hopes of making the transition as smooth as possible.

According to Reams, the conversion went well and the pre-installation resources provided the necessary tools the legal assistants needed to learn and explore the software

prior to the scheduled go-live date. Now, in less than two months from the date of purchase of PerfectLaw®, the firm was ready to 'go-live' with the new All-in-One® system.

## Results

Since implementing PerfectLaw®, the firm immediately took advantage of workflow improvements and productivity increases. The firm found the All-in-One® approach both improved communication and efficiency. The shared information, such as profiled client emails, was now easily accessible to all attorneys working on a case. Additionally,

attorneys have found it convenient to enter their time as each task is completed and posting their time on a weekly basis. With the new ease of time entry linked to scheduled events, the firm is convinced they are capturing time that may have previously been lost.

Locating documents has become easier as well. With PerfectLaw's Full Text Search feature, documents can be located easily even if the client/matter information is unknown. The standard reports library was useful in providing requested information quickly and easily. And with the implementation of the Back Office accounting system, workflow has been streamlined and many steps automated that were once time consuming in a three system environment.

The PerfectLaw® team anticipates Melli Law will discover additional benefits from improvements in workflow with increased productivity and efficiency as they continue to take advantage of the many synergistic benefits that can only be provided by PerfectLaw® All-in-One®.

**PERFECTLAW®**  
**ALL-IN-ONE® SOFTWARE**

Corporate Headquarters

PerfectLaw® Software  
6100 Blue Lagoon Drive, Suite 350  
Miami, Florida 33126

Phone: 800.749.6200

Email: [info@perfectlaw.com](mailto:info@perfectlaw.com)

Web: [www.perfectlaw.com](http://www.perfectlaw.com)