

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



Case Study

Robison, Curphey & O'Connell gets more than they bargained for with an All-in-One® product

Rich with a 135-year-long history tracing its lineage back to Clarence Brown and Frederick Geddes who began practicing law together in 1874, Robison, Curphey & O'Connell, like its hometown of Toledo, Ohio, maintains a progressive attitude while retaining its personalized level of service clients have come to expect. The firm's practice areas cover a wide range of services, including Agribusiness, Banking & Finance, Business & Corporate, Employment & Benefits, Estate Planning, Probate & Taxation, Health Care, Litigation, Professional Liability, Real Estate & Construction, Transportation, and Workers' Compensation. With a seasoned staff of legal professionals working in five different offices (Toledo, Findlay, Waterville, OH/Adrian, Monroe, MI), RC&O is rich in diversity and community, providing legal counsel to clients large and small, public and private, families and individuals.

A Necessary Change

Firm software is intended to assist with internal workflow and client services. But when a software client has difficulty getting the support they need from their software vendor, the technology begins to hinder performance rather than enhance it. Ultimately, when this begins to occur, it is a matter of time before a firm's ability to expand is stifled. So, when RC&O's version of its previous vendor's software was several versions old and it became increasingly difficult to find knowledgeable technicians to provide the support they needed, a change became necessary. With the understanding that a system upgrade is a major decision, the firm decided to begin its research in 2004 and assigned the firm's Network Administrator, Logan H. Smith, to research potential vendors.

Although the decision to replace their system was driven by the need to replace their financial software vendor, the firm decided to add several features they did not previously have, specifically, Document Management, firm-wide docketing, as well as matter related calendaring and contacts. After extensive due diligence attending webinars, conducting reference checks, reading product reviews, and reviewing vendor response to firm questionnaires, the firm narrowed their list of vendors to include Elite/Prolaw and PerfectLaw®. Upon further research, the

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firm determined that having a software package with different databases and modules that required synchronization was something they did not want to deal with. In the end, RC&O decided a single database solution was the best fit for them.

RC&O was now looking at a comprehensive solution incorporating features of their existing system plus more. Additional factors were considered as part of the revised evaluation criteria for a single database solution. The software's accounting piece needed to do everything the firm required from a timekeeper/billing perspective, the interface needed to be user-friendly enough to not discourage attorneys, and the underlying structure needed to be manageable by in-house administration. "We had to be certain that our final decision had to meet every one of our needs, but be easy enough for everyone in our organization to use," says Smith. The firm ultimately selected PerfectLaw® All-in-One® after nearly a year of thorough due diligence evaluating products.

The Transition

Upon making the decision, the next step was establishing a plan. A successful installation requires thorough communication and planning. With Smith leading the implementation team for the firm, 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.

As with any transition, Smith still had concerns. Smith felt the greatest challenges RC&O would face included both a successful conversion and having everyone begin using the software as quickly as possible. Even though PerfectLaw® provides several resources to prepare firms for the transition, a switch to a new system can wreak havoc on new users trying to adjust to new software, processes and workflow. Ultimately, according to Smith, "the installation was well-planned and executed...and the conversion team was great about addressing issues as they arose." And to ease the training

"PerfectLaw software has allowed us to integrate all our key financial and front office components. Financial data, documents, payment history, contact information and related parties are all a few keystrokes away and this feature is indispensable for the attorney when on a telephone conference with a client. All of the client's information is immediately available without switching between software applications. The ability to easily perform full text searches of documents stored in PerfectLaw is also a great time saver for attorneys and support staff. Documents are located quickly and reference documents are easily accessed. This was a very important feature for us when evaluating PerfectLaw and it has lived up to our expectations. We have had some customization done to meet our specific needs, but that process has been painless with the results meeting our expectations. Overall PerfectLaw has been a good fit and choice for us. "

-William Schlosser, Firm Administrator, Robison, Curphey & O'Connell

needs, in addition to the training provided by PerfectLaw®, RCO coordinated three additional internal company-wide training sessions to ensure all users were properly trained to use the system.

...5 years later

Prior to making the change to PerfectLaw®, RC&O faced difficulties getting the support needed from their software vendor, thereby establishing a critical benchmark for RC&O in measuring the longevity of future software vendor relations. PerfectLaw® understands that support is just as important during the installation process and it is after the system is in place. In fact, PerfectLaw® has taken feedback from its customers and have incorporated a workflow to facilitate the entire service process. Understanding the need for flexibility, PerfectLaw's support team makes every effort to accommodate our clients, from service request submission to completion. "The ability to send service requests via email is a pleasant break from other companies that require form submissions or phone calls," says Smith. PerfectLaw® allows users to submit their requests via email, phone, or by entering a request directly into our service queue via our Customer Service Website. And, PerfectLaw® makes every effort to offer expedited service regardless of the request. According to Smith, "the service team has been very responsive, with almost all issues being resolved the same day."

In addition to providing an easy to use interface for both case and financial management, the staff has taken advantage of the efficiencies provided by PerfectLaw's Document Management System. Previously, staff housed their documents in a folder structure on the network. When someone needed to open a document,

the user would open Windows Explorer and navigate through at least five levels of directories to locate the specific file. According to Smith, "[the] structure itself lacked consistency, and it took almost an hour to perform a search when looking for specific content in the documents. Now, documents are easily accessible within the matter, and full-text searches only take a few seconds."

More than what they initially sought when launching a software search 5 years ago, the PerfectLaw® All-in-One® functionality has contributed to improved communication, efficiency, productivity and service. PerfectLaw's All-in-One® Suite has given the firm the ability to access financial information, documents, contacts, and calendars all from one software package. So, firm staff can access information with greater efficiency without delays. All information for a case is readily available within the matter window. According to Smith, "using PerfectLaw®, we have been able to relate these items to each other, allowing our attorneys to more easily access information and thus provide our clients with better and more efficient service."

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