

When Craig Needham, Mark Davis, Peter Kirwan and Phil Young decided to form a new law firm partnership in San Jose in August, they knew they would need an integrated technology solution that met their requirements and budget, and needed it operational by October.

A search committee was formed that consisted of lead legal assistants, Kristin Snow and Debbie Myers, and attorney Anne Kepner. The firms they were leaving had previously used ProLaw and Legal Master. The committee reviewed Case Master, TABS III, Legal Master, ProLaw, Timeslips, and Abacus. They were most impressed with the integrated solution proposed by Bill Baker of Baker Cadence

than we previously had. As a new firm with attorneys from other firms it is very important that we check not only our case and billing information, but we need to know if a party is mentioned in our documents as well. Case Master's conflict search is extremely fast and provides a report that allows us to drill-down to the data from the report. We never had this level of technology with ProLaw and I appreciate the time saved by not having to review files and reports".

Another appreciated feature is the tracking of billable time on a daily basis. "I use all the functions in Case Master and TABS III to track my billable time", says Attorney, Anne Kepner. "I can quickly preview a

Needham, Davis, Kirwan & Young, LLC reviewed Legal Master, ProLaw, Timeslips, Abacus, Case Master and TABS III. They selected Case Master and TABS III

INTEGRATED CASE MGMT, BILLING AND DOC MGMT WAS THE KEY TO SUCCESS FOR THIS NEW FIRM

Solutions, an STI reseller/consultant in the Bay Area. Their proposal included STI's Case Master, TABS III, Accounts Payable, General Ledger and Worldox from World Software Corporation. After calling references supplied by Mr. Baker, they signed a sales order on September 9th and were fully operational on October 1st.

Over a weekend, their data was converted from ProLaw to Case Master and TABS III. In addition, their documents were converted into Worldox which was then integrated with Case Master.

The firm was impressed by the "user friendliness" in Case Master and TABS III, and how easy it was to learn to use. They were also delighted with the integration. A new client matter entered into either Case Master or TABS III would appear in the other system as well as Worldox. "We like how user friendly the STI software is compared to ProLaw" says Kristin Snow, Legal Assistant. "We were surprised how fast we learned how to use the applications. We were using Case Master and TABS III the first day of operations with little difficulty". "We really like the Conflict of Interest check in Case Master," said Debbie Myers, Legal Assistant. "Case Master's integration with Worldox provides us with a more comprehensive search

report that shows me the time entries and totals for any period and drill-down to the data record, allowing me to easily make the edits I need. We did not have this level of flexibility before and I can better manage my time now".

Did Needham Davis Kirwan and Young make the right technology decision? Kristen Snow says, "I called the firms referenced by Baker Cadence Solutions. We now know why everyone had only good things to say. This truly is a great integrated solution for law firms. We made the right choice and have already recommended it to other firms".

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