

ProLaw®

Case Study

Yost & Baill LLP

Innovation Earns Long-Term Customer
Loyalty to ProLaw



Innovation Earns Long-Term Customer Loyalty

Yost & Baill LLP, a 30-person firm in Minneapolis, MN, selected ProLaw® seven years ago for its comprehensive features, user-friendly approach to financial and practice management, and forward-thinking technology. Today, creating efficiencies around managing the practice and business of law remain at the core of ProLaw’s development strategy. Thomson Elite continues to pursue innovative features and functionality for ProLaw that competitively position law firms for a mobile, electronic, multi-location, Web-accessible practice that does not require expensive overhead or an IT staff. And Yost & Baill continues to choose ProLaw.

The Power of ProLaw

ProLaw automates case, relationship and document management, as well as time entry billing and accounting as a single solution. From a partner’s perspective, ProLaw has had a positive impact on the firm’s internal organization and processes, and has increased client service and satisfaction. “I have numerous examples over the years where we have improved productivity and enhanced our client relationships because ProLaw provided us with the right tools. We feel it has given us a competitive edge, particularly in the niche subrogation market,” shares Jeff Baill, partner.

Because of its two distinct areas of practice, general business and insurance subrogation, Yost & Baill requires separate management and reporting practices, and the ability to

manipulate large batches of data. They handle approximately 1,500 to 3,000 high volume, low revenue cases annually; and their high revenue cases can take six months to several years to complete and must meet complex client billing requirements.

Baill is quick to give ProLaw credit for enabling the firm to take on such unique and complex clients from a technology point of view. “We would not be able to effectively address the administrative needs of our diverse client base without ProLaw. It is the heart of our infrastructure,” says Baill.

Competitive Advantage

Master Complex Client Requirements

Yost & Baill notes that the insurance industry is becoming more and more demanding with its reporting needs. The firm is required to provide data on a regular and last-minute basis. Baill and the rest of the firm have always been confident that ProLaw can handle any reporting or invoicing requests from its clients.

For example, one of the firm’s key clients recently required new customized reporting and billing procedures. First, the accounting department was tasked to set up an entire system to handle the large amount of arbitrations from four different client locations; about 3,000

Client Overview

Founded in 1980, **Yost & Baill LLP** is a nationally recognized, AV Rated law firm that advises individuals and businesses in all aspects of the law.

The firm is headquartered in Minneapolis, MN, with offices in Milwaukee, Wisconsin.

Yost & Baill maintains the highest possible rating granted by the independent Martindale-Hubbell Corporation National Legal Review for legal expertise, ethics and professional reputation.

annually. Then, they had to generate both flat-fee and contingent-fee billings on a monthly basis. “It was massively complicated,” says Tina Andresen, office manager and self-taught ProLaw guru. “We were able to consolidate the invoice into one master invoice that could handle the different billing formats.”

Jeff Baill expands on the significance ProLaw had on this important assignment. “We couldn’t have handled the client’s extra business if we didn’t have the ProLaw technology infrastructure in place. Figuring it out manually would have required too many people and take too much time for us to be profitable.”

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– Jeff Baill, partner, Yost & Baill

Produce and Analyze Reports Efficiently

Since Andresen is largely responsible for all of the firm's internal and external reporting needs, she is a big advocate of ProLaw's built-in report writer, which makes it easy to generate detailed management reports for efficient data analysis. The solution allows her to design reports by dragging-and-dropping fields, moving columns and changing headers and fonts – with the click of a mouse. Plus the new “quick print” report feature in ProLaw v.11 gives Andresen the choice to print or save reports exactly as they appear on screen in a variety of file formats, such as PDF, Excel and HTML. “We do not have an internal IT person, so these user-friendly reporting features are essential for us,” adds Andresen.

Valuable Queries

The entire ProLaw database is accessible through a query window at each user's workstation. This means that financial and practice management data can be combined into a single report from simple queries submitted in plain English. “The query functionality is phenomenal. I can easily drill down and get the exact data I want to create custom reports in 10 minutes. It's great to have both front and back office information in one report.” says Andresen.

Staff at Yost & Baill run pre-configured report queries as part of their regular work routine. ProLaw v. 11 offers the added advantage of being able to save personal queries on their navigation pane, which gives users one-click access to the individual report queries they run most often.

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– Jeff Baill, partner, Yost & Baill

“It's really helpful for those users who are not very technical. The queries are so easy-to-use,” adds Andresen.

Internal Benchmarking

Combining practice and financial management information on one technology platform has provided Jeff Baill valuable internal benchmarking statistics. Firm management has easy access to key performance data that they leverage in business development opportunities. “We have exact data on the number of files we receive and how much money we are recovering for our insurance clients. This is powerful information that makes potential clients take notice. Most firms just don't have access to that type of data,” shares Baill.

Furthermore, Baill and partners are better equipped to run the firm proactively. Jeff reviews his performance dashboard every morning, which includes revenue projections and amount of new and completed files. “We are able to stay on top of our arbitration practice from an operational and client service point of view,” says Baill.

Automation, Coordination, Organization

Case Management

From a single screen, Yost & Baill attorneys maintain all of their case management files and information,

including documents, events, contacts, notes, phone calls and discussions. They often use case notes to communicate internally. Everyone uses notes to record every event that happens with a particular case from phone calls to incoming documents.

“We rely heavily on the notes section. It used to be a nightmare to find the paper file and make updated notes. Now everyone is committed to entering all information electronically. It saves time looking for the file, plus all the information is current and accurate,” says Baill.

The Paperless Office Becomes a Reality

A long-term goal of firm management has been to transform their practice into a paperless firm. Too often attorneys and staff waste time looking through files for specific documents associated with a matter. This was especially troublesome when the client was on the phone and the information was not where it was supposed to be.

The firm has been proficient at using ProLaw's Pro Filing feature, which captures documents, emails and appointments generated in Microsoft® Word, Microsoft® Outlook and Outlook Calendar and associates them with matters and case files. Yet additional paper-based documents related to specific cases, such as mail from

opposing parties and case management scheduling orders, were sometimes hard to find.

Because of ProLaw's unique importing capabilities, paper-based documents simply need to be scanned into an electronic format and imported into the case management system with the appropriate case file number. The firm has installed document scanners at both of their office locations and now they are using an electronic fax system so all paper documents can be directly stored in ProLaw. Its Milwaukee office and the high-volume practice in Minneapolis are already completely paperless.

"We were relieved to learn that we did not have to invest in a third-party software program. Moreover, we are excited about the increased productivity and lower overhead costs that a paperless firm provides," says Baill.

Continuing to Leverage ProLaw

Yost & Baill was one of the first firms to implement ProLaw v. 11, which gives staff a head start on incorporating all of the new capabilities into their day-to-day activities. "We know there are more efficiencies we can take advantage of in ProLaw – everything is already built in. We have peace of mind knowing there is plenty of room to continue to grow with ProLaw," adds Baill.

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