



CASE STUDY:

Goldberg Segalla: The Attorney Dashboard

Challenges

Goldberg Segalla is a North American firm based in Buffalo, New York with more than 425 attorneys spread across 22 locations throughout the United States. The firm wanted to give their lawyers more transparency into all their processes, but needed a robust, out-of-the-box solution for knowledge management. Lawyers were falling short on time entry and had no way of viewing things like their billable hours for the month, WVIP, or AR, making it difficult for them to keep track of essential tasks and costs. They didn't have a centralized location to find all the information they needed to get through the month. To get anything done, lawyers had to resort to manual processes – all requests had to go through email, putting additional pressure on the back-office teams such as finance. With the lack of transparency and difficult processes for getting information, Goldberg Segalla needed to find a solution that worked for the front and back office at all 22 office locations.



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Solution

Goldberg Segalla sought to create a lawyer dashboard with a scorecard – a simple letter-based grading system that gave managing partners and lawyers more visibility into their day-to-day activities with a letter grade. Along with the scorecard, the dashboard needed to show lawyers their billable hours, WIP, AR, write-offs, and more, eliminating the need for manual processes and emails to back office teams just to check on these important items.

To create the dashboard, the firm needed a user-friendly solution that could be easily customized to fit their growing needs and integrated with the products the firm already used. The only solution that checked every box was Aderant Handshake.

Short-term and long-term plans were strategized, and the firm needed a solution that could handle both phases, but not all at once. Phase one of the plan was the lawyer dashboard that they wanted to be implemented quickly. This phase was successfully implemented just six months after project kick-off.

The long-term plan – phase two – consists of an intranet redesign, practice group pages, directories and more. Goldberg Segalla hopes to have phase two completed within the next year.

Business Impact

Phase One success:

- With the letter grading system in place, lawyers now enter time daily, creating greater visibility while generating more revenue and collecting for the firm, and more billable hours for the lawyers.
- Less pressure from lawyers on the accounting staff – the accounting team has seen a huge decrease in the number of requests because of the implementation of the lawyer dashboard.
- With the backing of the Managing Partner and practice group leaders, adoption has been excellent with 100 percent of the firm's lawyers using the dashboard.

In Their Words

"Right now, we're working on a knowledge hub, where everyone in the organization will want to go in the morning. We've had huge success with the lawyer dashboard; it's decreased the requests for certain financials that the lawyers can now see on their dashboard, which has saved countless hours. Since implementation, we've seen the number of lawyers entering their time, on time increase dramatically. It's been a very positive cultural shift in our firm.

— Tony Draksic, Chief Information Officer, Goldberg Segalla



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