

Creating a More Effective, Efficient and Happier Law Firm: Derrevere, Stevens, Black & Cozad

Users: 75
Locations: 6 + Remote Work
Prior Platform: Aderant



Derrevere Stevens Black & Cozad (DSB&C) was founded in 1995 by Jon D. Derrevere. With its principal office in West Palm Beach, the firm has offices in five states, including Massachusetts, New York, New Jersey, and Vermont, employing 36 attorneys and a total staff of 75.

DSB&C is a multi-faceted boutique firm specializing in complex litigation, insurance subrogation, insurance defense, insurance coverage matters, construction defects, premises liability, auto negligence, product liability, and real estate matters. Since the pandemic, the firm has operated almost entirely virtually, with 98% of its staff working from home.

Background

DSB&C used Aderant's Total Office for its practice management, document management, and billing for approximately ten years. While the on-premises system worked well for several years, the firm recognized that its growing practice, multiple locations, and Aderant's announced plan to discontinue Client Profiles, the firm's financial package, created the perfect scenario to move the firm to the cloud. DSB&C worked with Aderant and became an early adopter of its cloud-based product.

Ultimately, the application proved challenging and didn't meet the firm's needs. Michael B. Stevens, the firm's Managing Partner, worked extensively to resolve the issues and ultimately decided to seek another solution. He said:



"Our people were unhappy with the tools we were giving them to do their job and the level of service we were able to provide to our clients. It was clear a change had to be made, or we would lose a number of valuable employees."

People sit in front of their computer screens all day. Regardless of position, every task you give someone to do will likely flow through the legal software the firm selects. And so, from the minute they log in first thing in the morning until they say goodbye at the end of the day and return to their families, they interact with that software. The least I can do is give them tools to make their jobs easier."

Making the Transition

The firm evaluated several cloud-based practice management products, including ZenCase, Actionstep, Rocket Matter, Centerbase, and Zola Suite (now Caret Legal). Mr. Stevens and a committee representing every user group in the firm determined ZenCase, coupled with NetDocuments (for document management) and Quickbooks (for billing/accounting), was the best solution for DSB&C. Before making that decision, the team thoroughly reviewed the products to ensure they would meet the firm's needs. Mr. Stevens shared:

"ZenCase was the first demo we saw. None of the other products we reviewed came close. The others made us feel like we had to contort ourselves into some funky shape to practice on their platform. ZenCase was the only company that had a lawyer demonstrate the software. I was searching for a way to alleviate my employees' pain points, and there was a connection and understanding of our concerns that the other companies couldn't match."

After the problematic transition the firm previously experienced, the decision was made to implement the new system in stages. The first stage, the NetDocuments conversion, worked pretty seamlessly. It wasn't easy to extract data from the old system(s), but within months, the firm was up and running on the new system.

Next came the practice management and financial stages. As an early adopter of ZenCase, DSB&C made several requests to expand ZenCase to fit their needs and found the company willing to take their input and accommodate their requests. Working closely with the ZenCase team, DSB&C was able to migrate their data and begin transitioning the team to the new product. Candy Lobeck, the Firm Administrator, said:

"I can't say enough about the ZenCase team. Their tech support is amazing. When I need a special report, they jump right on it. They are very responsive."



A 21st Century Approach to Tech

Now that DSB&C has been running the firm on ZenCase for almost two years, they report that every department and practice group in the firm is significantly happier with the technology they use to tame their busy practice.

ZenCase's customizable document and task 'blueprints' (think workflow automation) eliminate duplicate work and errors. Starting with new matter/client intake, the support staff enters relevant information into ZenCase. Using a matter-type dependent blueprint, ZenCase sets up the file and automates date-dependent tasks so nothing slips through the cracks. Similarly, document blueprints enable the firm to create documents using data stored in ZenCase quickly and efficiently. What previously took hours of manual entry, checking, and re-checking is now reduced to a few minutes. ZenCase's blueprints have increased the firm's work volume without increasing staff.

ZenCase's security permissions and layers of oversight have enabled the firm to establish and manage access to files, balance workloads, and easily review utilization rates.

DSB&C reports they now have a system they can trust and don't worry anymore that tasks could fall through the cracks. They also have a system that is fast and responsive. Where previously, the staff was frustrated waiting for the old system to update, they now report ZenCase has eliminated their frustrations and helps them get their work done faster.

Ms. Lobeck shared that ZenCase is constantly listening to their requests and making improvements to help them practice better. For example, she said:

"One of the most challenging issues is ordering and retrieving medical records. ZenCase has jumped in and developed a solution to make these tasks more efficient."

Mr. Stevens added:

"Whether you are the receptionist, a legal assistant, a paralegal, or the managing partner, it doesn't matter. Legal software is the smallest thing you can change to have the greatest effect as a whole on the productivity and overall morale of a law firm. With the right software, its positive effect is exponential from top to bottom."

ZenCase solved all the problems I knew I had and gave everyone at the firm a daily user experience that exceeded all of our expectations. Even after we went live, ZenCase has listened to our needs and responded with solutions. They raised the bar for everyone in the firm. We're more effective, efficient, and happier than ever before. The word 'grateful' would be a gross understatement to describe what ZenCase has meant to me and my employees."