

ELITE CASE STUDY

UPDIKE, KELLY & SPELLACY, P.C.

ENTERPRISE UPGRADE OPTIMIZES PLATFORM
FOR LONG-TIME ENTERPRISE FIRM



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BENEFITS OF UP-TO-DATE TECHNOLOGY

Founded in 1967, Updike, Kelly & Spellacy, P.C. has grown in size, capabilities and reputation, and is now recognized as one of the major Connecticut law firms. The 44-attorney firm may be considered a mid-sized firm, yet management has invested in larger firm technology solutions to even the playing field. For example, the firm implemented Elite Enterprise in 1999 as its core financial and practice management platform.

At the time, the firm leaders were looking for more functionality and features with a system that integrated general ledger (GL), accounts payable (AP), time and billing, and marketing capabilities. Enterprise was implemented to improve overall workflow and reduce administrative time with a standardized platform, and has been delivering benefits ever since. Recently the firm took advantage of the opportunity to upgrade to Version 3.8.

Updike, Kelly & Spellacy had passed on some minor, interim upgrades; therefore, Frank Mauri, IT Director, was most excited about the overall system improvements the firm would benefit from with 3.8. Plus, it provided the opportunity to re-educate the staff on the underutilized features and correct any inconsistent usage, thereby ensuring that Enterprise was fully optimized.

“I have to say that this was the smoothest implementation I experienced in the last 15 years!”

Frank Mauri
IT Director

SEAMLESS UPGRADE PROCESS

For the first time in the 10 years of maintaining Elite, Updike, Kelly & Spellacy decided to use Elite Consulting Services for this upgrade. Both Mauri and Deneen Seifel, Firm Administrator, who made up the internal project team, rave about the professionalism, process, support and training from their Elite team.

Seifel talks about her initial concerns about using Elite’s Consulting Services. “We are a smaller firm and therefore worried that we wouldn’t get the attention we needed to address any problems that might arise. We didn’t want to get lost in the shuffle,” she explains.

Mauri had his own concerns on undertaking such a major upgrade with limited internal resources. “I anticipated a lot of downtime and issue resolution, plus after hours and weekend work. But none of this happened. I have to say that this was the smoothest implementation I experienced in the last 15 years!”

“Our Project Manager was top-notch and executed the upgrade process seamlessly, and the engineering support was wonderful,” continues Seifel. “Several times, we had six Elite support representatives resolving various items at the same time. We felt well covered to say the least.”

During the training phase of the implementation, an Elite trainer was brought in to not only explain new features in 3.8, but also to review areas where the firm could improve the system. For example, the trainer ran conflicts and records reports that showed inconsistencies on how data was entered into the system, causing issues when managing records and performing conflicts searches. He also included useful tips and tricks during the training that really help the staff use the system more efficiently, such as when users should include an “&” in a search. All the instructions were well documented in helpful user manuals.

UPDIKE, KELLY & SPELLACY, P.C.

With offices in Hartford and New Haven, the firm provides full-service legal counsel to businesses and individuals. The 44-attorney firm is a founding member of Meritas Law Firms Worldwide, one of the first networks of independent law firms.

GOAL

To take advantage of new Enterprise features and functionality and optimize the system with more standardized processes.

WHY UPGRADE ENTERPRISE?

Enhanced functionality improves overall speed and stability of data.

BENEFITS

- Increased productivity with better access to information
- Improved system stability for enhanced system performance
- Improved conflict searches and reporting
- More billing flexibility to meet client demands

"I certainly didn't expect our trainer to be as proactive as he was," says Seifel. "We were still receiving additional emails six weeks after our training ended on information that was relevant to our environment. And in the process, we cleaned up our database to allow for better reporting."

"Our upgrade has enabled us to better define how we interact with Enterprise to ensure it is optimized. Now that every interaction is standardized, our staff is more productive and the overall systems works better for us."

Deneen Seifel
Firm Administrator

TANGIBLE IMPROVEMENTS

Conflicts Searches – Updike, Kelly & Spellacy has an established conflicts workflow process, which includes outsourcing conflict searches to a facility management company. The process is quite streamlined and efficient, yet staff was not able to take advantage of the power of prospective batch results. Conflicts Manager in Enterprise now allows the firm to track additions, modifications and deletions of batch names. In addition, records have been linked and "hit detail" screens have been updated to provide more complete information. Combined with the enhancements made to the database, these conflicts reports are much more concise and easier to manage.

Billing – The Accounting Department now has more flexible billing capabilities to easily customize templates based on individual client requests, including task-based billing, multiple party billing and electronic billing. The firm has been able to successfully capitalize on Hartford's reputation as the "Insurance Capital of the World," which means responding to rigorous e-billing demands from large insurance companies. E-invoices represent up to 50% of total monthly invoices.

Billing Manager allows staff to attach user-defined field information to a bill—directly at the bill level—to better track information at an invoice or payment level from clients and record more accurate data. This speeds the process of getting clients set-up in the system and billing faster. "Our 0-60 day aged account receivables have definitely improved," adds Seifel. "Plus through attrition, we've been able to maintain one less person in the accounting department."

Speed & Access to Information – "Inquiry screens are much more manageable and robust as they allow us to easily sort data for the exact view we need. We can simply cut and paste the data into an email, which keeps these reports in electronic form rather than wasting paper," says Seifel.

Standard reports formats have been enhanced to capture related information within a single report, whereas before it required two or three reports to present the same information. Ad-hoc report requests are easier to generate with more standard selection options. Month-end report generation is completed in about half the time with Version 3.8.

Performance & Reduced Maintenance – Mauri is happy to report that with nightly batch processing, he can now "set it and forget it." Previously, he would have to reboot the server quite frequently to properly complete the database processing. Since the firm went live with 3.8, he has not had to reboot at all.

In addition, the system experienced indexing errors about once a month, which most directly affected conflict searches with inconsistent or no results. Mauri had to re-index the whole system, which would take the better part of a day and required all staff to be logged off from the system. "These indexing errors have been completely eliminated," he says. "Plus our customer support tickets have been noticeably reduced. I spent about 10 hours each month on maintenance issues with our outdated version of Enterprise. Now I spend about five minutes a month."

Staff firm-wide have experienced some form of performance improvements. Conflict searches take five seconds versus two minutes. Report queries take about half the time. Administrative time setting up e-billing clients set up has been streamlined. "The overall processing time of Enterprise is about 40% faster," shares Mauri.

All of these improvements have added up to increased productivity. "Our upgrade has enabled us to better define how we interact with Enterprise to ensure it is optimized. Now that every interaction is standardized, our staff is more productive and the overall systems works better for us," says Seifel.

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Frank Mauri

DON'T WAIT, ACT NOW

Upon reflection of the upgrade process, the biggest success in Mauri and Seifel's minds is that a 44-lawyer firm completed a major core system upgrade with two internal staff and was live essentially the next business day. "The process was so seamless that most people weren't even aware that we completed the upgrade," shares Mauri.

"An upgrade like this can be intimidating, especially for the size of our firm. But Elite has developed a comprehensive process that includes all the support a firm would need. We have certainly realized the value of keeping current with the latest version," adds Seifel.

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Deneen Seifel

For more information about the latest versions of Elite Enterprise and Elite Consulting Services, please call **(323) 642-5200** or visit elite.com.



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