

Industry Solutions

Legal

■ Solution Overview

Company Profile

Gatti, Keltner, Bienvenu & Montesi was founded in 1970 and operates two offices in Memphis, Tennessee. Focusing exclusively on personal injury, car accident, workman's compensation and wrongful death cases, the firm offers the services of ten attorneys.

Situation

Rapid growth and a burgeoning caseload had begun to take its toll on Gatti Keltner's response to clients' information requests. Relying on the telephone or fax machine meant delays that began to compromise the firm's efficiency. In addition, making disbursement calculations by hand was time-consuming and prone to errors. Gatti Keltner wanted to automate their office to eliminate these problems.

Business Solution

Gatti Keltner talked to many vendors about their goal, but they had no takers until they met Technology That Helps. Their image-enabled database application tracks all information and documents on every case, including scanned documents, in-house documents, and fax transmissions to/from the firm as well as color photos. Running on Microsoft server applications, InstantFile integrates with Microsoft Office products for a seamless solution.

Benefits

"We have found that our attorneys can handle almost 100 percent more cases using InstantFile instead of paper files," says Martin Bienvenu, Partner. "It's like having twice as many lawyers in the office." And that translates to twice as much business and higher revenues.

Gatti Keltner Bienvenu & Montesi PLC

Telephone tag is an obsolete game of hit and miss at this law firm in Memphis. When they replaced their custom UNIX-based application with Technology That Helps' InstantFile, running on the Microsoft® platform, Gatti Keltner gained an image-enabled database application that automatically traces all information and documents for each of the firm's cases. InstantFile enables attorneys to carry twice as many cases as they did handling paper files.

Aspiring to a paperless office is on the wish list of many businesses these days, but when the law firm of Gatti Keltner Bienvenu & Montesi deployed Technology That Helps' InstantFile, they came closer than they imagined to achieving that goal. Not only did Gatti Keltner take the opportunity to rid themselves of a lot of time-wasting paper-based procedures, but they upgraded their computer infrastructure from an old UNIX/Informix custom application with X-terminals to a 100 percent Microsoft-based platform.

"We have found that our attorneys can handle almost 100 percent more cases using InstantFile instead of paper files," says Partner Marvin Bienvenu. "It is like having twice as many lawyers in the office. We found the Microsoft BackOffice® family of technologies to be solid products that integrated seamlessly. Everything could be controlled from the same application development environment, presenting itself to users as one seamless solution."

Telephone Tag a Nightmare

Doing business the old fashioned way using the telephone and fax machine had begun to compromise Gatti Keltner's service and impact the efficiency of their two offices. When clients and other parties involved in legal matters called for information about case status, the relevant information in paper files had to be retrieved and reviewed before their inquiries could be answered.

"Telephone tag had become a nightmare," says Bienvenu. "As the firm grew, people's memories could only keep track of a smaller

and smaller portion of their active case files, so searching for paper documents began to increase dramatically."

Faxing document copies consumed a large amount of time and manual disbursement calculations were prone to errors.

Gatti Keltner's technology environment prior to installing InstantFile did not alleviate the problems of a burgeoning caseload. The original InstantFile application was written in Informix-4GL, and the data was stored in an Informix online database running SCO UNIX. In 1995, the application was re-written to run under Microsoft Access, which made access to data significantly easier.

Today Gatti Keltner's solution is a sophisticated 100 percent Microsoft-based client/server solution that draws on COM and the seamless integration of Microsoft desktop, development, and server products, including the Microsoft Windows NT® Server 4.0 operating system, Microsoft SQL Server™ 7.0, Microsoft Office, and the Microsoft Visual Basic® development system. In addition, Microsoft Proxy Server provides law firm partners secure access to InstantFile from home via high-speed Internet connections. Finally, Gatti Keltner is using Microsoft Systems Management Server 2.0 for remote administration and deployment of software upgrades.

Click, Don't Dial

Once rollout was completed in August 1999, Gatti Keltner had a complete computer-based information system. InstantFile provides instan-

taneous access to all information about pertinent legal matters, enabling significantly improved client service.

The information now available electronically includes scanned documents, in-house produced documents, notes to the file, follow-up tickler lists, fax transmission to/from the firm, color photos—anything that can be stored on a computer is organized by InstantFile.

Documents created by the firm are captured as they are created, and those that come from elsewhere are scanned and stored as they are received. Color photos relating to cases are stored electronically and can be viewed from each attorney's 20-inch monitor.

"Most client enquiries can be answered without having to call back," says Bienvenu. "And documents in the file can be faxed while still on the phone with the person who requests copies."

The solution also provides complete reporting on case loads handled by each partner and/or associate, and settlements by partner and/or associate, enabling proactive caseload management and performance evaluation.

Balanced Calculations

Manual calculations are no longer necessary because InstantFile relates expenses to each

matter as they occur. Firm-generated expense checks are automatically attached to the appropriate matter. Medical expenses are automatically itemized and totaled for each matter and liens are noted where appropriate. "Escrow account disbursements can be calculated and checks printed without any manual calculations—and they always balance!" reports Bienvenu.

Settlements are generated when InstantFile retrieves all expenses, medical expenses, and liens from the SQL Server database. Balanced calculations are done reconciling recover amount, firm fee, expenses, liens and remaining recovery due to client.

Microsoft SQL Server OLAP Services enables Gatti Keltner to analyze the number of new matters opened monthly, quarterly and annually. Armed with this sort of information, partners can make better business decisions and assess the ongoing workload by associate and partner. They can also measure the value of matters settled over time, and by the responsible attorney.

Concludes Bienvenu, "InstantFile, integrated with Microsoft SQL Server, provides instantaneous access to information about legal matters the firm is involved in. And that has made a huge difference in the firm's efficiency, which translates into a much healthier bottom line."

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Marvin Bienvenu

Partner

Gatti Keltner Bienvenu & Monesi, PLC

■ For More Information

About Microsoft

Call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (800) 563-9048. Outside the 50 United States and Canada, please contact your local Microsoft office.

For more information about Microsoft BackOffice-based legal solutions, visit the Microsoft legal industry home page on the World Wide Web, at <http://www.microsoft.com/industry/legal>.

About Technology That Helps

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Technology That Helps provides technology consulting services for small business. These include feasibility studies, project scoping, prototyping, custom application development, integration, on-going maintenance and support. The company has special expertise in small business databases and Microsoft Office interoperability solutions.

Microsoft Software Used

Microsoft Access 97

Microsoft Exchange Server 5.5

Microsoft Office 97

Microsoft Outlook® 98 messaging

and collaboration client

Microsoft Systems Management Server 2.0

Microsoft Proxy Server 2.0

Microsoft SQL Server 7.0

Microsoft Windows NT Server 4.0

Other Software Used

LeadTools (imaging)

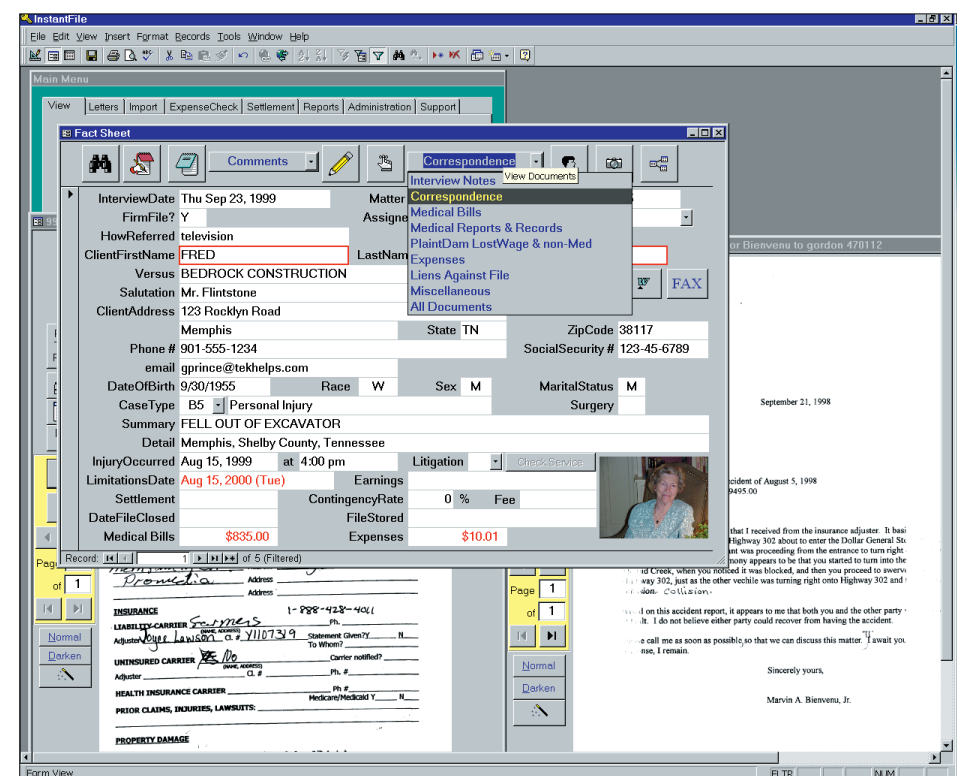
LTC Telcom Fax

Pronexus (fax toolkit)

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Everything from the paper file is viewable from InstantFile—and it's always properly organized