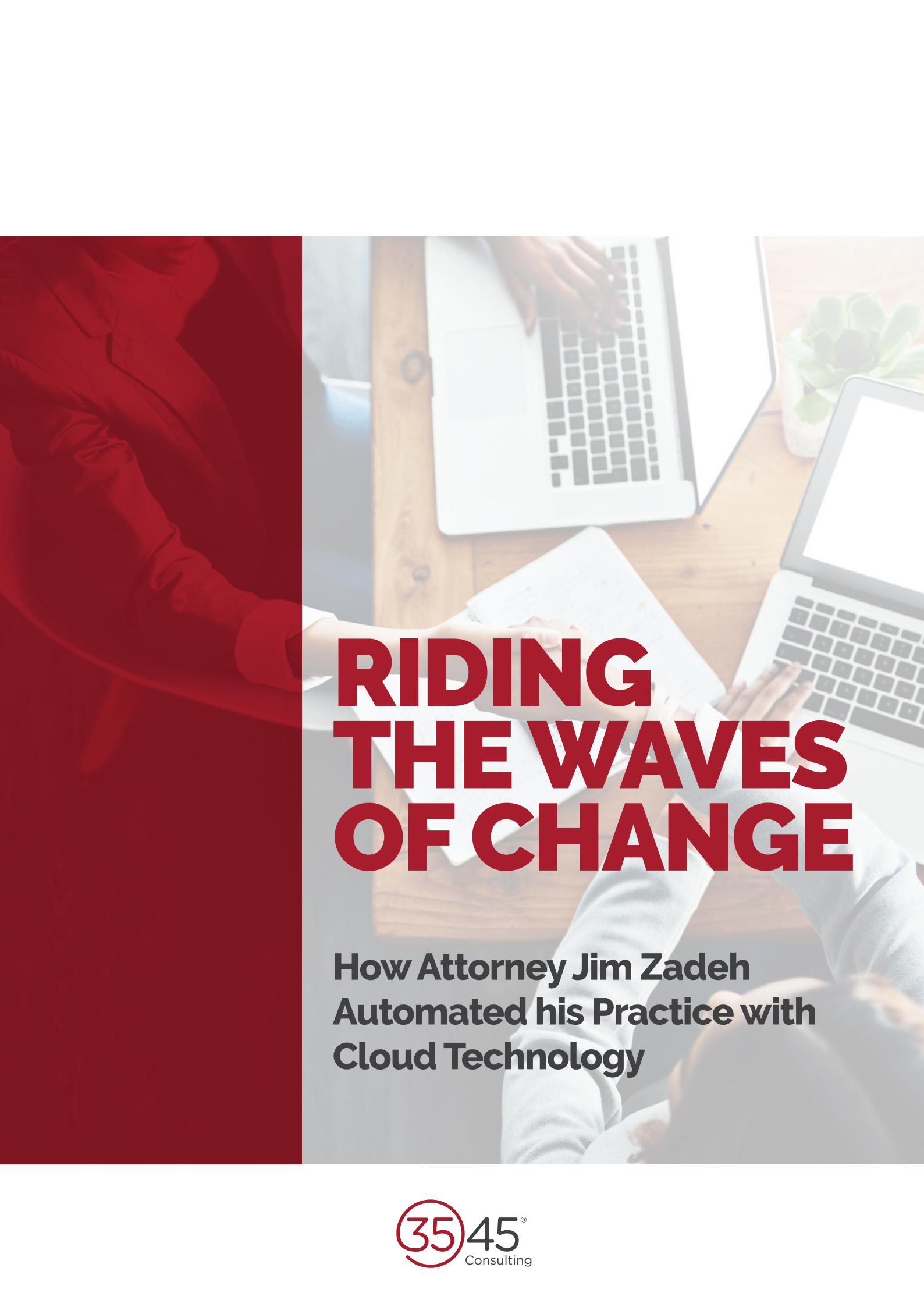


A person wearing a red jacket is seated at a wooden desk, working on a laptop. Another laptop is open to the right, and a small green succulent sits on the desk. The scene is brightly lit, suggesting a modern office environment.

RIDING THE WAVES OF CHANGE

**How Attorney Jim Zadeh
Automated his Practice with
Cloud Technology**



How Attorney Jim Zadeh Automated His Practice with Cloud Technology

Esteemed Attorney and Law Practice Management Professor at Texas A & M University, Jim Zadeh shares his journey through the changes of legal technology from the early days of buying servers to migrating to the cloud.

After years of working for a large firm, attorney Jim Zadeh embarked out on his own in 2002. As he processed his decision to leave, he searched consultants. On the hunt for who he would consider to be the premier legal technology consultants in the country, the 3545 Consulting Global group stood out as a potential partner.

As Jim met with partners Nancy Griffing and Arthur Cruz he explained that he wanted to invest in the best technology possible. Infrastructure that would enable his firm to grow for years to come. Arthur focused heavily on the technical aspects he and his team would provide; servers, hardware and the physical installation of Time Matters. While Nancy, mapped out business processes, workflows and accounting requirements.

Implementation began shortly after the consultation, which in 2002 included a substantial amount accounting work. At that time, Billing Matters and Time Matters spoke to each other but did were not suited to handle complex IOLTA reconciliation or reports. At which point, Caren Schwartz from the 3545 Consulting Global team, and author of the QuickBooks Guide for Lawyers stepped in to take the lead quickly resolving the issue.

Fast Forward to 2008

The practice has been running smoothly for just over six years, with a total of six users operating on Time Matters when the organization was acquired by Lexis Nexis. A turn of events that forced an annual maintenance plan renewal or “AMP” fee on clients worldwide. However, Jim held out... waiting for a cloud practice management platform to arrive that could mirror the complex business process automations and accounting tools implemented by the team. Every year, Jim would meet with Nancy and discuss his options. Patiently waiting from 2008 to 2014 for the right solution to come along.

Decision Day

The 3545 Consulting Global team, now certified Centerbase Partners presented Jim with a plan for his firm that would not only mirror the functionality he was used to, but also provide a foundation to grow the practice in the cloud for years to come.



Implementation

As a dominantly Personal Injury and Car Accident Law Firm, business process and case automation was a significant portion of the planning process. The ideal scenario for the practice was to automate every step, in Jim's words;

“From the form we use when the client initially calls to the moment the check goes out.”

With a go-live date set the clock was ticking on all fronts, from the migration of data to workflows architected, tested and released. In true partnership form, the entire 3545 Consulting Global team stepped up to make it happen. Over 20 hours of mind-mapping was conducted with Elizabeth Nguyen and Sarah Rosas as part of the process.



A New Day

The start of a new era requires new skills, a pattern the team at 3545 Consulting Global recognizes and appreciates. With every new deployment, extensive training of all law firm personnel is planned out with the same attention to detail as the software. Additional training was provided to ensure that employees were comfortable, issuing checks, locating cases, accessing documents and recording billing activities.

“The conversion went super smooth, not only the case data but also the accounting records came over beautifully.”

Words spoken by Jim shortly after the migration, rarely heard when law firms transition to the cloud is a true testament to the care in prior planning.

Looking Ahead

Now that Jim and his team have had some time to get comfortable using the Centerbase platform, further refinements and expansion of functionality is the icing on the cake. Empowered to automated processes for referrals using unique forms, together the teams have created the ultimate law firm automation system.

“The end result is that we have been able to achieve a highly automated practice. From the time the potential new client calls until the time the checks go out, every step, task, document, and dollar are accounted for in our system.”



To learn more about Jim's transition to the cloud, contact the 3545 Consulting Global's team directly at: 713-789-3323.