

An Attorney's prospective: Our interview with Matthew Burkinshaw about his experience with Casetracker123

Gary: How long have you been working with Casetracker123?

MJB: About a year and a half.

Gary: What has your overall experience been in working with Tom Steed and his staff?

MJB: Tom and his staff, particularly his programmer Sandeep Seshadri, have been very responsive to our needs. Any time we've asked for a special feature or to change the look of the interface to match our firm's needs, the changes have been made very quickly and to our satisfaction.

Gary: Has Casetracker123 been able to meet your specific needs through customization? If so, can you shed some light on what they're able to do so some of our readers can see why they should consider the service and how it's different from others?

MJB: The base system itself is very user friendly so we haven't had to do much customization to the main interface. However, we have a unique way of keeping track of performance both through collector activity and client performance. Every client is assigned a liaison who is the primary contact for that client at our firm. We were able to customize our version of CaseTracker123 so that we can track fees earned both by liaison and by collector.

Like with others systems we looked into, we've also been able to add our own documents to the system for data-merging and set different levels of access to files and data for different levels of employees. The real difference for us in choosing this system though is the level of responsiveness to our requests and how quickly problems are fixed. As with every software program there are a few glitches here and there or it just becomes apparent that there is a better approach to a particular function. Tom and Sandeep are very responsive and open to changing the program to fit our needs and the changes are made quickly.

Gary: What is the best part(s) of using Casetracker123?

MJB: The biggest benefit to us in using CaseTracker123 is the flexibility it provides. Being able to work off a secure network from any internet connection has proven very useful. We don't have to leave our office server running all the time to access files offsite. We have been in meetings with clients at their office and used the software to access their cases from their own computers. This is a great marketing and client service tool for the firm. And because we also have the option to give clients access to their own cases it cuts down on the time previously spent on reporting on the status of cases. Now clients that are connected can sign in, add claims and check the status of their own accounts. We can also customize their interface so they see as much or as little of their files as we want. The software also provides us with a number of ways to keep track of payments and invoice clients on both hourly and commission based fees while giving us the trust accounting tool that we need as a law firm.

For more information on Casetracker123 and their services please call 800-270-1197 or email info@casetracker123.com.

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