

CARET Legal

Regional Law Firm Consolidates in the Cloud with CARET Legal

FIRM

Newman & Lickstein LLP

LOCATION

Syracuse, New York

PRACTICE AREAS

Corporate & Business Law

SWITCHED FROM

Multiple Disparate Systems

Founded in 1967, Newman & Lickstein takes pride in being the trusted legal advisor for a variety of specialized legal services on behalf of families, businesses and communities. As such, the firm offers an incomparable level of expertise in its advisory and collaborative efforts to help clients confidently navigate new opportunities personally and professionally. The firm based in Syracuse, New York, focuses on complex business and corporate transactions and has recently focused specifically on working with startups, influencers, esports and gaming companies.

In April 2022, the firm implemented CARET Legal (formerly Zola Suite), a cloud-based end-to-end online law practice management platform. “We were looking for an all-in-one solution to house our accounting, finance and front and back-office functions in one location,” states Jonathan Runge, director of finance and consulting for Newman & Lickstein.

Looking for a new solution

Prior to implementing CARET Legal, the firm was using Worldox for document management, QuickBooks for billing and TSheets (later known as QuickBooks Time) for time tracking; however, all of these disparate products made for a disconnected workflow. With that in mind, they knew things had to change and a decision was made to start the search for a holistic solution. After doing research on a number of providers in the legal practice management space, the team determined CARET Legal to be the best option.

CARET Legal is the industry’s only end-to-end legal practice management platform that connects both front and back-office tools for ultimate efficiency and seamless workflow.

“We are a smaller practice, so after seeing the demo of CARET Legal, we realized it was a good fit for our firm,” continues Runge. He goes on to say, “I liked the automation of their timekeeping. When you are drafting an email, the system will start your time entry and save that time in a specific matter.”

The document management capabilities allow users to work and file at the same time as other users in Word and Excel – similar to how a Microsoft Teams scenario functions.



Their support is a 10 out of 10! We went live and really didn’t skip a beat.

And the online, integrated payment capability was something the firm considered a must-have in a product, so when the team saw that CARET Legal had embedded payments, it was another selling point. “It was a necessity to have online payment functionality, and CARET Legal brought that. While we have a lot of clients that pay through bill pay systems, we also need for our customers to have the ability to pay with a credit card and ACH payments.”

Transition

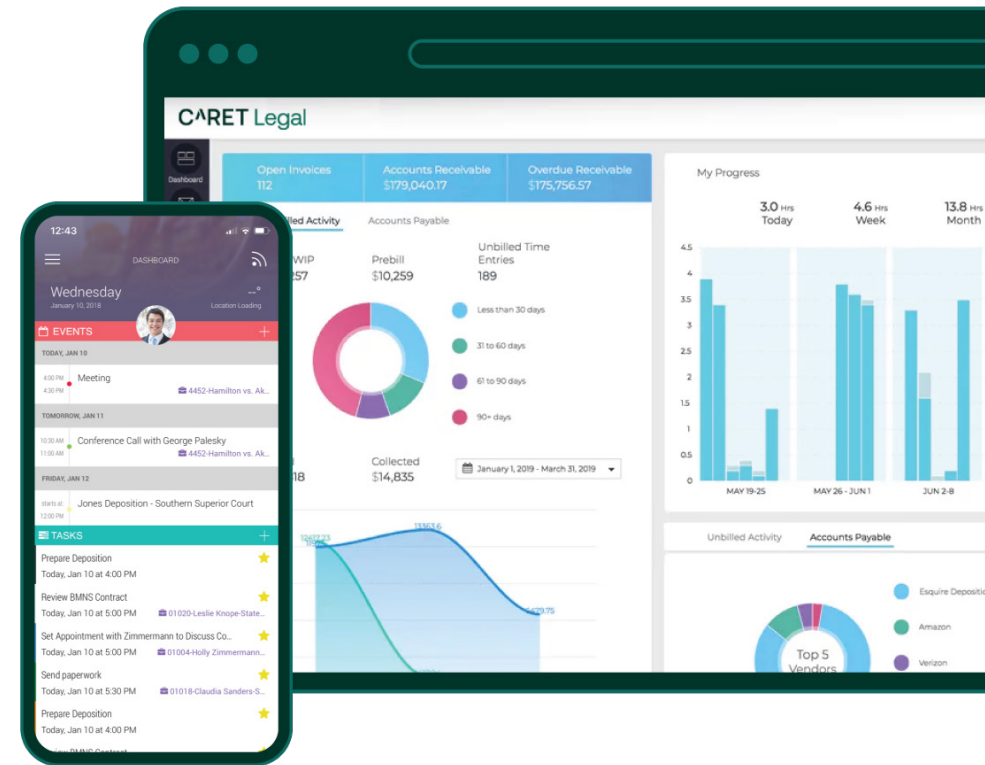
"I've been through a couple different software transitions in my career – and while they are great when they are done, they are never fun while they are happening. That being said, the CARET Legal transition wasn't that bad. In fact, the customer service aspect was phenomenal," states Runge. Runge found that when staff needed anything, they could get someone from CARET Legal to jump on a screen-share within minutes to show them how to access it. In addition, the team at CARET Legal provided clear, detailed data migration instructions so the data to be moved over could be easily imported. According to Runge, he spent less than two hours preparing all the data to be transferred.

Runge also found training at CARET Legal to be amazing. There was only a three-week period between signing the contract and full implementation, including training. The CARET Legal team was also willing to provide additional training when new users needed to be brought up to speed. As the one heading up this project for the firm, Runge thought the execution on this timeline was "great for such a large implementation."

Results

Since integrating CARET Legal, the firm now has fully centralized all documents online and in the cloud. "Prior to CARET Legal, everything was a bit disconnected – we had some files on a server, some on paper," states Runge. "Being able to be 100% cloud based is so important – we can house everything in one platform!"

As a result, the firm has seen a 15% increase in billable time based on better tracking. One goal for 2023 is to get everything stored for client matters in CARET Legal, which will be a huge advantage for the firm's hybrid work scenario. While everyone is back in the office currently, this availability will allow for staff to have other options as well as the ability to work with vendors outside the same city or state.



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"The firm bought CARET Legal based on my recommendation, so I particularly wanted to prove that it was worthwhile . . . and I can! In the short time we have had the platform, our time savings alone have shown the value CARET Legal has brought to our firm," concludes Runge.

