



# How Gaido & Fintzen Moved to the Cloud Without Business Disruption

CASE STUDY

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**Minimal**  
downtime during  
multipart migration

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**Complex**  
workflows replicated  
and enhanced

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**Faster**  
invoicing and  
payments

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Moving from servers to the cloud was very involved, and it could have gone sideways—but the migration was a success thanks to Centerbase’s support.

**SUSIE SALDIVAR,**  
Office Manager, Gaido & Fintzen

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Gaido & Fintzen is a boutique law firm based in Chicago, Illinois. The award-winning team specializes in a wide range of practice areas, such as litigation, insurance defense, nonprofit and corporate matters, and data privacy and security.

## HIGHLIGHTS

### CHALLENGES

- Expensive, server-based systems
- Complex workflows needed to be replicated without interruption
- Tight deadline for implementation

### CENTERBASE SOLUTIONS

- Smooth, organized onboarding
- Easy-to-use platform
- Robust workflow automation
- Streamlined billing process

### RESULTS

- Virtually no business disruption
- Replicated and enhanced existing complex workflows
- Faster invoicing and payments

# Challenges

## Transitioning from servers to the cloud

For years, Gaido & Fintzen used on-prem software to track matter data and billing, with everything stored on servers. The warranty on the servers was about to expire, and Gaido & Fintzen were at a crossroads: Could they find a cloud solution that met their needs, or would they need to replace the servers and renew with Tabs3/PracticeMaster?

*“Our options were to either get servers and continue with the solution we had in place, or find cloud software that could do what we needed,” explains Susie Saldivar, Office Manager at Gaido & Fintzen.*

The cost of replacing the servers would be considerable—approximately \$100K—but Susie worried they might not have an option if no solution met their needs. Despite extensive research, only one cloud alternative emerged with all the features Gaido & Fintzen required and valued, like supporting and expanding the firm’s numerous complex workflows. That solution was Centerbase.

On the very day Susie was set to purchase new servers, she spoke with Centerbase—and discovered Centerbase had the functionality Gaido & Fintzen needed, and more.

“It was really important to us to eliminate the need for servers. We had a very hard time finding a solution until we came upon Centerbase,” Susie says.

Further, the Centerbase team worked closely with Susie throughout the implementation to ensure the new solution was in place before the warranties on the servers expired.

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## Solution

### A smooth onboarding experience

Centerbase sprung into action, supporting Susie and her team at every stage.

Preparing all data to ensure it would migrate over accurately was job one. Susie and her team worked closely with the Centerbase team to clean and validate the data, ensuring everything was complete and correct.

*“We had many conversations to make sure the data was mapped and migrated properly because there was so much to bring over and in so many categories—and obviously, everything needed to be accurate,” says Susie.*

Centerbase mapped all data carefully and made adjustments as needed during the migration process instead of doing a massive “lift-and-shift.”

Gaido & Fintzen also leveraged Centerbase’s customer onboarding platform throughout the process. The platform gave Susie and her team an easy way to:

- See tasks, deadlines, and next steps all in one place
- Communicate with everyone in a centralized location rather than relying on multiple emails
- Organize and control access to files and resources that needed to be uploaded/downloaded

Well before the go-live date, superusers were already in Centerbase, getting comfortable and adjusting dashboards. By day one, two dozen workflows were complete or in progress.

“The onboarding process could have been terrible and glitchy, but, instead, it was super dreamy,” says Susie. “I couldn’t have asked for a better onboarding experience. Everything went great.”

### **An easy-to-use platform**

With Centerbase in place, the Gaido & Fintzen team immediately recognized the ability to sign into the platform from any browser, without having to access a specific computer.

Partners and attorneys in particular liked how easy it was to enter their time. They could also see important information, such as AR, right on the platform without having to dig or run reports.

*“Attorneys can pop in and see their team’s hours on their dashboards or with just a few clicks. They can also quickly see if a client hasn’t made a payment in a while, which is very useful and helps in many ways,” says Susie.*

### **Robust workflow automation**

Gaido & Fintzen relies on Centerbase as their single source of truth. Everyone can see what is due and when, and act on next steps. Matter information is organized and kicks off from a single place.

When information is updated in Centerbase, such as the name of an insurance adjuster, the new contact is automatically updated in correspondence generated from Centerbase.

*“We’re able to generate accurate and complete correspondence using Centerbase tools,” says Susie.*

When correspondence is generated for an adjuster, for example, Susie knows it will include all of the required and relevant information thanks to the document generation workflows.

“The letter is specifically designed to include everything the client asked us to include about a claim, for example,” says Susie.

The firm is also using workflows to automatically update calendar reminders.

“We generate a calendar reminder when we issue the subpoena, automatically setting it to the applicable deadline. The workflows we created in the system help us track data accurately and consistently per the client’s instructions,” Susie explains.

### **Streamlined billing process**

With Centerbase, Gaido & Fintzen can invoice their clients faster than ever before.

“We can send a bunch of bills out very quickly. It’s a game changer for us,” says Susie.

With invoices going out faster, Gaido & Fintzen get paid sooner—partly because Centerbase makes it easier for clients to pay.

*“We received payments the same day on matters that were previously slow-paid because the bill payment process is fast and easy for clients,” says Susie.*

Susie and her team configured Centerbase to set up a billing link where clients can view their balance, see recent payments, and make new payments.

“It makes a huge difference for everybody, for us as the senders and for the recipients who can quickly pay and knock bills out as they receive them,” Susie says.

Now, credit cards are a very popular method of payment—with payments often coming in the same day invoices go out.

“I thought credit card payments were going to account for a very small amount based on our prior payment history. But we’ve seen over 10 times the number of credit card payments, and it increases each month,” says Susie.

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# Results

## Moving ahead with virtually no downtime

Just as important as the smooth migration from servers to the cloud was completing an accurate and full data migration with virtually **zero business disruption**.

Today, attorneys and staff have a central source of truth for all information. They were able to seamlessly replicate their existing workflows in Centerbase and even enhance some to be more efficient. They now have over **80 workflows** configured in Centerbase.

Susie credits the support she received from Centerbase for the ability to **complete the evaluation, migration, and onboarding process in just five months**, from her first contact with Centerbase to going live in the cloud.

“It makes a big difference when your business is valued. Centerbase supported us in all the ways we needed to be supported. Knowing that, why would you go somewhere else?”

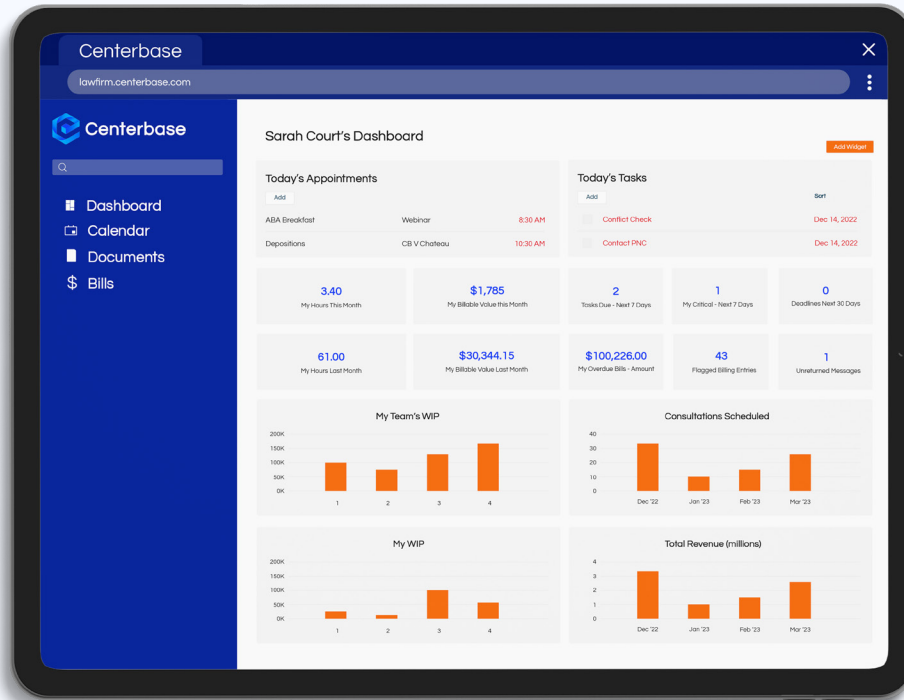
As an added benefit, Gaido & Fintzen is billing faster and getting paid sooner, contributing to the firm’s bottom line.

*“Our time is our product, and timely payments are what we need to run the business successfully,” says Susie.*

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An accurate and timely implementation of an all-in-one cloud-based solution.

If you want to explore how to transition to Centerbase without business disruption,

[click here to get a demo!](#)