



# How a Midsize Litigation Firm Increased Cases by 152% With Minimal New Hires

CASE STUDY

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Nearly 2X

Faster completion of case work

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Improved

Employee onboarding from 2 days to 1 hour

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100%

User adoption



“

We've grown exponentially from before Centerbase to now. We have more than doubled our volume of cases and can still handle them by adding only a couple of staff.

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**EMY COOK,**

Head of Operations & Marketing, Powers Taylor LLP

Powers Taylor LLP is a boutique litigation law firm located in Dallas, Texas. Founded in 2005, the firm currently handles cases involving commercial litigation, personal injury claims, product liability claims, medical malpractice litigation, and nursing home neglect claims.

## HIGHLIGHTS

### CHALLENGES

- Inefficient, error-prone processes
- Demand to provide excellent client experiences
- Overwhelming onboarding and training

### CENTERBASE SOLUTIONS

- Implement a configurable Centerbase solution
- Optimize processes
- Improve client experience
- Attract and retain top talent
- Use data insights for strategic decision-making
- Strengthen referral relationships

### RESULTS

- 152% increase in case load without having to add new staff at the same rate
- Nearly 2X faster completion of case work
- Improved employee onboarding from 2 days to 1 hour
- 100% user adoption
- Higher client satisfaction

## Challenges

### 4 disparate firm management platforms

With multiple disparate systems in place to manage the firm, the attorneys and staff at Powers Taylor spent a lot of time identifying and locating all the materials and context needed to move cases forward.

*“We’d have to send a bunch of emails and see if anyone had the missing document or could remember what had happened with a particular case,” explains Emy Cook, Head of Operations & Marketing, Powers Taylor.*

The firm had four platforms in place to manage different firm functions:

- Actionstep for case management
- Internal server for document management
- Pipeline for new client signups
- Brief Accounting for accounting and timekeeping

None of these platforms connected to the others, which meant attorneys couldn’t get the full picture of a client engagement from start to finish in one centralized place.

### Inefficient, error-prone processes

Without one consolidated platform, attorneys and their teams often relied on spreadsheets to manage projects and had to complete steps manually.

Not every team member had access to every system—and even if they did they still might not find the case information they needed—which created delays and bottlenecks.

These inefficiencies took a toll on attorneys and their teams, leading to frustration.

“Not everyone used every platform. So there was always a lot of back and forth and stuff could get missed,” says Emy.

### **Demand to provide excellent client services**

These disconnected, inefficient systems also had a direct impact on client service.

When potential clients called the office, for example, attorneys and their teams couldn't quickly or easily determine if the firm had already done work for that client, and if so, when and what.

“We didn't have accurate reports on what cases we'd already signed up, where they came from, and when. It took too long to know if we'd already talked to a person, reviewed their case, or already done some work for them,” says Emy.

This sometimes led to the prospective client feeling underappreciated and attorneys spending their valuable time trying to get a picture of past interactions.

### **Overwhelming onboarding and training**

Having multiple disparate systems also created a barrier to the smooth and easy onboarding and training of new attorneys, paralegals, and staff.

At least two full days of training were needed to onboard new talent, which often overwhelmed them and dampened their enthusiasm.

“

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# Solution

## Centerbase all-in-one firm management platform



The firm needed a new solution. The team first looked at Filevine and PracticePanther. But when they found Centerbase, it became the obvious choice.

“We evaluated different things and decided that Centerbase provided the most value,” says Emy.

The team consolidated case management, document management, new client sign ups, and accounting onto the Centerbase platform while also streamlining processes and creating new efficiencies with automated workflows.

### Configurable Centerbase solution

Emy configured Centerbase to the firm’s specific needs, ensuring that the KPIs most important to the firm are captured.

“We added date-tracking fields to each phase of a case, from the initial phone call to settlement. It allows us to figure out how we’re progressing at each stage and where we can find efficiencies,” says Emy.

Emy creates these configurations herself without needing the help of a developer.

“I’m constantly going in and adding new fields or options to the dropdown menus so that we can get better reporting and track the life cycle of everything,” she says.

### Optimize processes

Everyone at the firm has access to what they need in the platform, eliminating delays and bottlenecks.

“It’s been very helpful for getting our practices more efficient and streamlined,” says Emy.

In some cases, attorneys are completely reinventing their processes. For example, Emy used Centerbase reporting to compare one practice that uses an outside vendor to order medical records to another practice that performs the task in-house. Emy found the process took twice as long with the in-house team than with the outside vendor.

*“We were able to convince the partner to have his team switch over to the external service and speed up the process. I don’t think he realized what a difference it could make until I pulled that report and showed the comparison,” says Emy.*

## Improve client experience

Today, when clients call the firm, team members can provide them with an update through just a quick search.

“[Clients] don’t feel like they’re just getting shuffled around to a bunch of different people. Anyone can pick up the phone and give them an answer,” says Emy.

She continues:

“Since everything is in Centerbase, we can respond to clients a lot quicker—and they’re more informed throughout the whole process.”

## Attract and retain top talent

Instead of being a barrier to top talent, the Centerbase platform and the firm’s streamlined processes are selling features.

*“On everyone’s first day, we do a run through of where everything lives and how to find it. And we just go from there,” says Emy.*

## Use data insights for strategic decision making

Centerbase also gives Powers Taylor attorneys the data insights they need for strategic decision making. Now, they can see which cases are the best fit for the firm and proactively seek more of them.

*“We have a lot more insight into where our cases come from and how much we settle them for. We’ve even been able to pinpoint the best places for us throughout the state because we want cases that are easier for us to organize by defendant, location, or other factors,” says Emy.*

## Strengthen referral relationships

Centerbase plays an important role in strengthening relationships with referral partners. Emy monitors reporting to see if any referral partner drops in their rate of referrals—and if so, alert the firm’s managing partners so they can take action.

“They’re able to reach out to their contact and rekindle that referral relationship. That’s not something we’ve done in a structured way before,” says Emy.

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# Results

## 152% more cases without adding staff at the same rate

Powers Taylor grew from 75 new cases per year before Centerbase to 189 new cases last year, a **152% increase in new cases** without having to add new staff at the same rate.

“We’ve grown exponentially from before Centerbase to now. We have more than doubled our volume of cases and can still handle them by adding only a couple of staff,” says Emy.

One of the reasons the firm is able to increase caseload so dramatically without having to hire at the same rate is because they’re **closing cases 40% faster**. Before Centerbase, the average time from matter initiation to close was 2.5 years. Last year, that metric was 1.5 years.

Faster case resolution is important to the firm, as Emy explains:

“The longer a case is in litigation, the longer we have to finance it and the more filings and depositions we have to conduct, which racks up our costs.”

Faster case resolution is just as important—if not more so—for Powers Taylor’s clients. Lower costs mean less cost to recoup from settlements, leaving more money in the pockets of clients.

It also reduces the mental strain on clients.

“It’s increased client satisfaction because lawsuits don’t drag on and we can get them resolved very quickly,” says Emy.

Emy is confident that Powers Taylor has the talent they need to serve the firm’s growing base of clients, especially now that **onboarding and training takes about an hour** instead of two days.

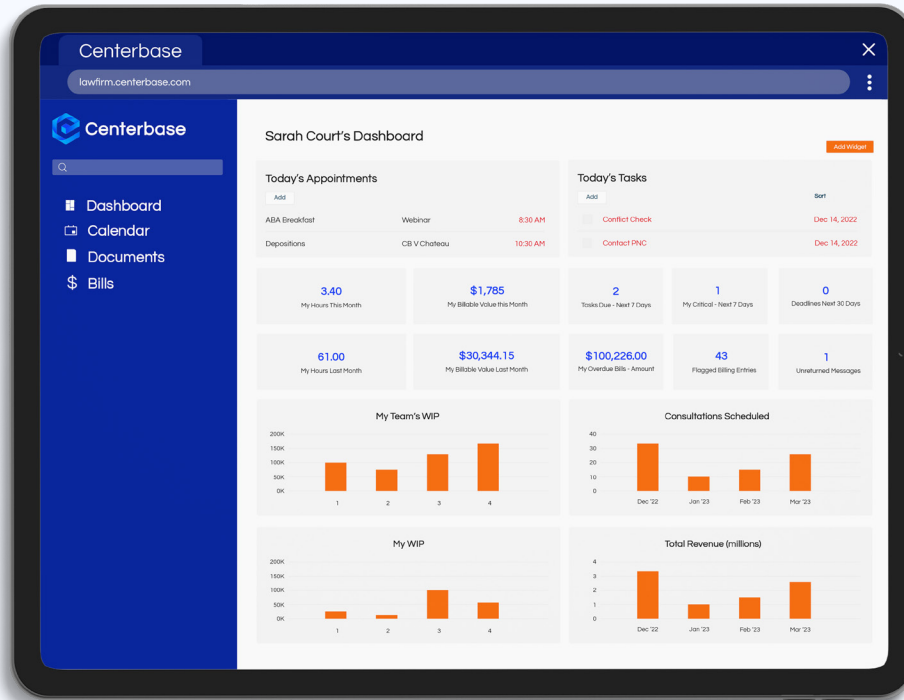
One of the keys to Powers Taylor’s successful Centerbase implementation is the platform’s ease of use, which explains the **100% user adoption rate**.

“Every single person in our firm, from our part-time admin help to our managing partners, uses it. Everyone is in there, all the time,” says Emy.

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Having everything in one place on Centerbase has really helped us serve our clients better, improve our processes, and get better as a whole.

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Explore how Centerbase can help you increase your caseload, deliver premium client experiences, and drive strategic business decisions for your firm.

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