



CASE STUDY

CAPES • SOKOL

Using a Trusted Advisor to Make the Right Choices When Moving to the Cloud

Founded by eight shareholders in 2001, Capes Sokol, a St. Louis, MO business and litigation law firm, has grown from twenty employees to over 40 attorneys and nearly 70 in total staff today. Like many law firms of its size, the firm is dependent on technology to meet the needs of its legal professionals and clients while remaining conservative in its adoption of cutting-edge technologies.

Deborah Trachsel, Executive Director of the firm, joined Capes Sokol in 2006 and, during her tenure, has seen the firm grow and has shepherded it through many changes, including the recent pandemic. While she previously worked as a Litigation Coordinator, Ms. Trachsel found she preferred the business and administrative functions of law firms.

Also, in 2006, Capes Sokol retained Circle Management Group (CMG) to assist them initially with its Timeslips and Peachtree software (now known as Sage 50). Laura Kennedy and the CMG team initially worked to integrate the two applications, enabling Deborah to manage attorney expense accounts and produce financial reports for the partners.

Time to Think About Moving to the Cloud

Like so many law firms, Capes Sokol had to deal with the challenges of the pandemic and a remote workforce. Server-based, legacy software no longer met the needs of its legal professionals, and yet, the firm wanted to take its time to make the right choice.

Ms. Trachsel's criteria included:

- **Cloud-based access where time could be entered on any device**
- **Integration with the firm's existing software, Net Documents (DMS), ContactEase (CRM), and Microsoft Office**
- **Streamlined billing with multiple adaptable billing formats**
- **Greater accounting functionality, practice group budgeting, and financial reporting**
- **Practice Management dashboards and reporting**



The Search Process

The firm engaged CMG to help evaluate its many options. Over time, Capes Sokol and Ms. Trachsel conducted an exhaustive evaluation of software products, including Elite 3E, Aderant, SurePoint, Coyote Analytics, Centerbase, Clio, Juris, ProLaw, Leap, Zebra Works, Tabs, Leap, Lexicon, PerfectLaw, PracticePanther, ZenCase, and more.

While some products on their list were geared toward larger firms and some toward firms smaller than Capes Sokol, the firm needed to make the right choice and leave no stone unturned.

Ms. Trachsel leaned on Ms. Kennedy to guide her through the process.

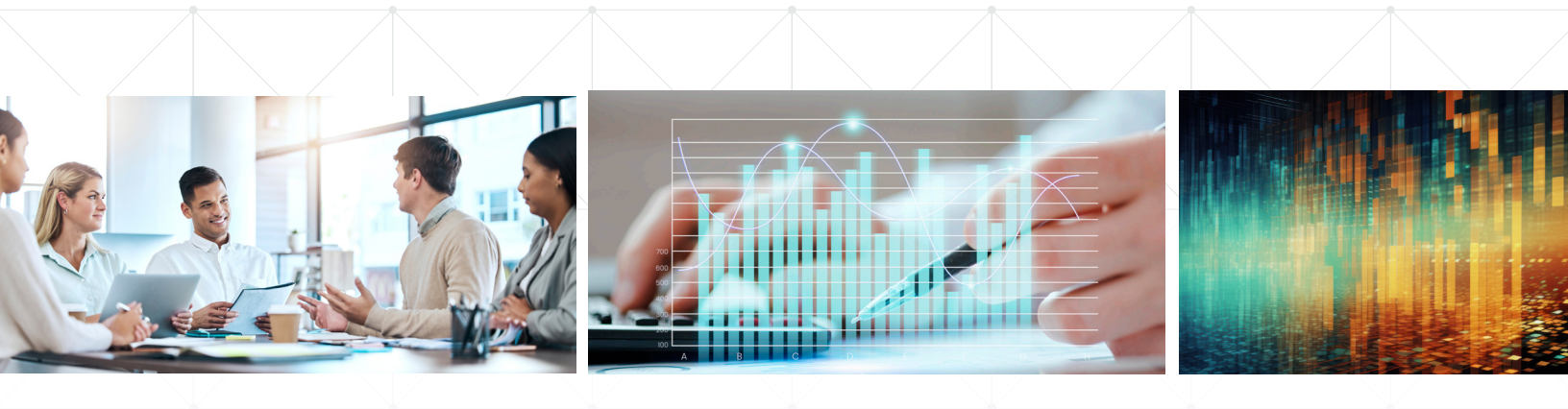
“As our trusted advisor, Laura made it so easy for us. She knows our environment, lawyers, practice groups, and the law firm’s history. She knows how we work and what we need, and because she is so familiar with all these applications, it was easy.

I still had to go through the process of elimination. I still wanted to look at them. She helped me with the questions I needed to ask so we could easily and more quickly determine which ones were a good fit. That proved to be invaluable.”

Over time, they were able to refine the many options down to their top choices and start deeply researching the vendors and their products.

Finally, the firm selected Coyote Analytics. Ms. Trachsel said:

“Laura thought that Coyote Analytics was our best fit. I thought it was our best fit. Others in our group thought it was the best fit out of everything we looked at. Coyote Analytics is also committed to customizing the app to fit our firm’s needs, and I plan to hold them to that.”



Implementation is Next

Changing critical software is not easy for busy lawyers and law firms. A migration and implementation process that focuses on user adoption is critical to the success of the project. Ms. Trachsel and Ms. Kennedy developed a process that will ensure that operations continue smoothly during the process. Ms. Trachsel added:

"Lawyers don't like having to learn new technology. So, obviously, we must ensure the lawyers are engaged and happy. It's going to be a terrific investment, and it is going to be a massive change in the way that the law firm works. I'm very excited. It will be challenging, but I've embraced this software and the notion that it will make Capes Sokal a better law firm."

"Laura's been so instrumental in getting us to this point, and she will continue because she will continue to work with us as the project manager. I thought ensuring that CMG was an integral part of this project was critical. Even though Coyote Analytics has a whole migration team, they don't know us, but CMG does. The project needs to stay on target and on task. The deadlines need to be met. And between Laura and myself, they are going to be."

CMG, The Trusted Advisor

CMG and Laura Kennedy have worked with Capes Sokol for nearly two decades. Over the years, the firm has come to rely on CMG for projects large and small that help it continue to operate efficiently. In conclusion, Ms. Trachsel said:

"The relationship with CMG and Laura Kennedy has been outstanding, and they have the highest degree of integrity. It's all about servicing their clients. The entire team is available 24/7 if we have an emergency and need to meet a deadline. They'll jump in and do whatever they need to do."

"The billing is fair and reasonable. You can't even put a price on the value CMG brings to our firm. They're fantastic partners and incredible people."