



From Legacy to Modern

How an Elder Law Firm Successfully
Modernized Their Practice Management

Background

Fitzwater Law is a well-established elder law and estate planning firm based in Portland with over 30 years of service to its community. The firm consists of 10 attorneys and 10 support staff members who relied heavily on Time Matters for case management and billing for two decades. As an integral part of their daily operations, Time Matters was deeply embedded in their workflows and processes.

The Challenge

The firm encountered several critical issues:

- **Their Time Matters software was experiencing frequent technical issues, particularly data corruption when integrating with WordPerfect, making document management increasingly unreliable**
- **The lack of technical support for their legacy system meant problems went unresolved, increasing risk to daily operations**
- **The solution needed to seamlessly integrate with their billing and accounting systems to maintain financial operations**
- **Staff were comfortable with the existing system, making change management a significant concern**
- **The firm required a solution that could handle elder law and estate planning-specific workflows their workflows and processes.**



The Solution

Fitzwater Law retained Laura Kennedy and Circle Management Group (CMG) to assist in their search. The firm followed a methodical approach:

First, Ms. Kennedy conducted a focused needs assessment with their office manager, Ms. Alyssa Fitzwater, who:

- **Had 7 years of experience managing the firm's technology**
- **Understood both attorney and paralegal workflows**
- **Served as the primary liaison for system requirements**

Upon completion of the assessment, she suggested the firm evaluate four leading cloud-based practice management solutions, and they ultimately selected Caret Legal based on its:

- **Intuitive, colorful interface that appealed to all stakeholders**
- **Comprehensive functionality that matched their workflow needs**
- **Strong vendor communication and support capabilities**
- **User-friendly design that balanced modern features with accessibility**
- **Ability to handle their specific practice area requirements**



The Implementation

The transition process was successful due to several key factors which CMG oversaw, including developing:

- **A clear project timeline**
- **Defined milestones and deliverables**
- **Regular check-ins and progress updates**
- **A step-by-step structured migration plan**
- **Detailed documentation of each phase**
- **Clear communication of upcoming changes**
- **Established contingency plans**



Consistent support from CMG team members included:

- **Multiple team members available for support**
- **Coverage for all technical questions**
- **Expertise in both old and new systems**



Regular communication between all parties Included:

- **Weekly status meetings**
- **Clear escalation paths**
- **A documented decision-making process**

Expert technical guidance during data migration confirmed:

- **Data mapping and validation**
- **System configuration and customization**
- **Training and support documentation**



The Results

The implementation achieved several significant outcomes critical to the project, including the complete migration accomplished within the planned timeline. All historical data was transferred successfully with no significant business interruption.

The Fitzwater team is delighted with the new system, which received high marks from both the attorneys and staff. It provides an improved user experience and better system reliability.

The Key Success Factors

CMG and Laura Kennedy specifically developed a trusted advisor relationship with Ms. Fitzwater, who was in charge of leading the project. Laura conducted a comprehensive needs analysis throughout the structured assessment process, created precise requirements documentation, and obtained stakeholder input.

Once a decision was made, CMG provided project management, maintained clear communication with all parties to ensure regular status updates, and proactively resolved migration issues.

“ I don't think I would have been as confident if it wasn't for them... CMG really laid it out the way that I needed it for my brain to understand and to be able to explain to my whole team... I never felt alone. ”

Alyssa Fitzwater, Office Manager

Conclusion

The transition from Timematters to Caret Legal, from initial assessment to final product selection, was completed in approximately three months. Implementation followed shortly after, and the firm was up and running in its new practice management system six months after the project's inception.

The accelerated timeline was only achieved through the firm's partnership and CMG's commitment to assessing the firm's needs, focused decision-making, and transparent project management.

The results: CMG led a successful transition, positioning the firm for continued growth and improved operational efficiency.

“ I really appreciated Laura and the CMG team. Their communication and coordination made this evolution a positive experience for me, as the project leader, and for adoption by the firm. ”

Alyssa Fitzwater, Office Manager



For more information or to schedule a consultation with the Circle Management team contact us at clientsuccess@cmgconsultants.com.



