

Pabian & Russell, LLC

A successful law firm turns to Supporting Strategies to address an antiquated billing system and inadequate reporting capabilities

With help from Supporting Strategies, Pabian & Russell has streamlined their back-office operations and vastly improved their billing and collections processes. As it turned out, with the arrival of the COVID-19 pandemic, the timing couldn't have been better.

Client Profile

Pabian & Russell, LLC, is a Boston-based law firm practicing in the areas of business, estate and gift tax planning; business law and commercial real estate; elder law; estate planning; estate and trust administration; and probate litigation and dispute resolution. The firm has 30 employees and seven partners.

An Inefficient System

Pabian & Russell used to have a small in-house team handling day-to-day accounts payable, accounts receivable and client billing. Their accountant, meanwhile, closed out the books each month. As the firm grew and thrived, it became clear that this approach wasn't working. For starters, the time-tracking process was incredibly inefficient. The attorneys recorded their time on paper forms. A member of the staff then spent hours each month entering the data into two different software systems that couldn't even communicate with each other.

The billing process was equally frustrating. The office manager generated physical billing summaries, which the partners reviewed and signed by hand, and then entered the data to create invoices. Producing and mailing paper invoices to clients regularly took up to 45 days.

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CEO
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Most troublingly, says CEO Margaret Burke, reporting was a huge problem — it was impossible to run reports that gave the firm the insights they needed to make strategic decisions.

“Let’s say I wanted to determine the profitability of one of our practice areas. That involves salaries, employee benefits, what we’re charging clients. I couldn’t get that information,” Burke explains. “We were in the middle of making a lot of plans, but the lack of data was holding us back. Eventually we realized it made sense to hire someone and not try to do this in house.”

In the Nick of Time

Burke’s search for an outsourced bookkeeping partner led her to Supporting Strategies. A meeting with Founder and CEO Leslie Jorgensen left her confident that Supporting Strategies could solve Pabian & Russell’s back-office challenges. The fact that Burke knew of three other businesses already working with Supporting Strategies sealed the deal.

Early in the relationship, Burke asked Supporting Strategies to develop a set of reports. While attempting to fulfill her request, Supporting Strategies concluded that new legal practice management software would be needed. They subsequently recommended a solution that would address Burke’s reporting needs.

In February 2020, Supporting Strategies completed the migration to the new system. In March, the COVID-19 pandemic hit, forcing all of Pabian & Russell’s employees to work from home. But since the firm could now handle time-tracking and invoicing electronically, they didn’t miss a beat. In fact, collections increased dramatically from March to April and May.

“It has definitely increased revenue. We’re able to bill much more quickly — typically by the eighth day of the month rather than the 15th of the following month,” Burke

says. “If we hadn’t implemented the new system when we did, I don’t know where we’d be right now. After COVID, there’s no way we could have gotten that information from everyone in a timely way.”

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Enhanced Reporting a Major Plus

The new system has also enabled much more robust reporting, as Supporting Strategies had promised. Burke now receives weekly reports with accurate information in a dashboard format. “The reports are easy to understand and to share with others,” she says. “And if I have any questions or requests, Supporting Strategies takes care of it right away.”

Burke credits Supporting Strategies with streamlining processes from credit card management and approval workflows to managing lawyer trust accounts. Consolidating everything into one system, she adds, has eliminated redundant tasks while reducing the likelihood of errors.

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According to Burke, one incident encapsulates Supporting Strategies' commitment to Pabian & Russell. After the firm's primary billing manager took leave for a medical emergency, Supporting Strategies immediately stepped in to take over A/R, A/P, billing and payroll responsibilities on a temporary basis.

"We'd had no plans to go down that road with Supporting Strategies, but it became a necessity," Burke says.

"They came through when we needed it and have even put documented processes in place to prepare us for situations like this in the future."

Freeing up Resources

Overall, Pabian & Russell has realized major efficiencies in staffing. Various back-office duties used to chew up significant hours for in-house staff each month. Thanks to greater automation and a shift to electronic processes, the firm has been able to free up resources to focus on strategic objectives rather than mundane back-office tasks.

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"Supporting Strategies has really helped us identify where we can improve and then given us solutions rather than just saying, 'Here's where you're inefficient,'" Burke concludes. "They've come up with ideas I never would have thought of on my own. I love my Supporting Strategies team — they've been as responsive as promised, and our experience with them has been excellent."

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