

LBMC Technologies Customer Solution Case Study



Customer: Tennessee Board of Professional Responsibility

Web Site: www.tbpr.org

Customer Size: 28 employees

Country or Region: United States

Industry: Legal

Partner: LBMC Technologies

Customer Profile

The Tennessee Board of Professional Responsibility monitors the ethical behavior for attorneys in the state. It is based in Nashville.

Partner Profiles

LBMC Technologies

(615) 377-4600

www.lbmctech.com

LBMC Technologies, LLC is a Microsoft Gold Certified Partner providing IT services and solutions to industries such as Professional Services, Manufacturing, Health Care, and more. With offices in Nashville, Knoxville, and Chattanooga, LBMC offers a collaborative approach to improving client operations and profitability.

Axonom

(888) 814-2880

www.axonom.com

Axonom, based in Minneapolis, Minnesota, provides enterprise-level Customer Relationship Management (CRM) and Partner Relationship Management (PRM) solutions for Microsoft Dynamics CRM.

Software and Services

- Microsoft Dynamics CRM 4.0
- Axonom Powertrak

Legal Oversight Organization Streamlines Operations with Help from LBMC Technologies

“LBMC really understands our business and the Dynamics CRM solution. With the Microsoft software and LBMC’s help, we are operating much faster and more efficiently than we could in the past.”

Nancy S. Jones, Director, Tennessee Board of Professional Responsibility

The Tennessee Board of Professional Responsibility (TBPR) needed a new IT platform to manage registrations and other information on more than 20,000 licensed attorneys in the state. The TBPR turned to LBMC Technologies for a new customer relationship management solution that streamlines registrations and payments, helps track ethics complaints, and provides a platform for more efficient daily operations.

Business Needs

The Tennessee Board of Professional Responsibility is charged with overseeing the ethical conduct of attorneys working in the state. Founded in 1976 by the Tennessee Supreme Court, the TBPR tasks include investigating allegations of attorney misconduct, prosecuting petitions for discipline, publishing ethics opinions, speaking at ethics seminars, providing an ethics hotline to answer attorneys’ questions about ethical issues, and offering a consumer assistance program. All lawyers licensed in the state—as well as outside lawyers temporarily working on Tennessee-based cases, known as *pro hac vice* (PHV) lawyers—must register with the TBPR. The organization currently has more

than 20,000 active Tennessee attorneys and more than 400 active PHV lawyers registered in its system.

Registering and monitoring the activities of such a large population is a challenging task for the TBPR staff, which includes 11 attorneys and 17 support employees. The organization’s IT infrastructure plays a vital role for the staff in its daily activities, but for years the TBPR relied on Linux-based systems that eventually became outdated and ineffective.

“When I arrived here in 2007, we were running four different databases, all of them isolated from one another,” says Nancy S. Jones, Chief Disciplinary Counsel

of the TBPR. "It was a real nightmare trying to search for information from each database, and there was no easy way to efficiently produce reports. The systems were old, unstable, and proprietary, making it very difficult to make any changes."

The TBPR began searching for a new solution that had to meet several criteria. It had to provide a platform for the seamless integration of important information, including payments, attorney profiles, and any actions taken in response to complaints about an attorney's conduct. The platform needed to be user friendly to minimize complexity and training, and had to provide extensive search capabilities. The technology also had to have a wide base of support so TBPR could easily obtain outside assistance with particular projects.

Solution

After evaluating its options and different IT solution providers, the TBPR decided to work with LBMC Technologies, which helps small and midsize businesses improve their operations and increase productivity with cost-effective solutions. The TBPR partnered with LBMC to implement a new attorney-management system using Microsoft Dynamics CRM 4.0.

As part of the solution, LBMC used Powertrak CRM from Axonom, an online portal that integrates with Dynamics CRM and enables easy registration and payments. The TBPR also works with Webb Tech Solutions, an IT consulting company based in Nashville, Tennessee, for its Web site development and management.

The TBPR and LBMC began deployment of the Dynamics CRM software in July 2009, focusing first on the design of the CRM system to enable a fully automated, online

registration process. The new registration system went live in July 2009. The second part of the CRM system deployment involves the creation of a new consumer assistance database and implementing a system for logging and tracking incoming ethics complaints so they can be linked to specific attorney registration information. The TBPR and LBMC are working on a system that will use Dynamics CRM to track complaints from when they are first received until they are resolved.

Dynamics CRM will also be integrated into the TBPR administrative activities, including accounting and invoicing tasks. To help with document management, TBPR is using an OnBase enterprise document management system from Hyland Software to scan paper documents as well as electronic files, which will be integrated with the Dynamics CRM system in a future phase.

Benefits

The decision by the TBPR to partner with LBMC to deploy a Microsoft Dynamics CRM solution has dramatically improved the organization's ability to manage its daily tasks. The TBPR successfully processed a large number of payments immediately after the system went online. The TBPR staff can now easily produce reports that help the agency monitor the attorney registration process more easily. In addition to boosting customer service, the solution provides a platform for long-term tracking of complaints. The TBPR also gained a valuable partner that can help the organization fine-tune its new CRM solution.

Faster Registration, Payment Processes

With Dynamics CRM and Powertrak, the registration and payment process for

attorneys is now completed faster and more efficiently. "During the first six weeks of the annual attorney registration process using our new online system, we efficiently processed more than 1,300 online credit card payments," says Jones. "It worked just as planned."

Better Reporting

With the new solution, the TBPR staff can create comprehensive reports much faster than they could in the past. "The new system is allowing me to go in and design and customize any kind of report functionality that I want," says Jones. "This means much greater flexibility in producing reports to respond to different kinds of requests."

More Efficient Tracking of Complaints

As the TBPR implements a CRM system for long-term tracking of complaints, it will be able to monitor the status of cases while being more responsive to the state's legal system and to consumers. "This system will help us more easily track cases to completion, while helping us with cases in which we need to respond to consumers who are having problems with their attorneys," Jones says.

An Effective Partner

"The LBMC staff is, in a word, fabulous," says Jones. "They could not be more responsive to our needs. In addition to helping with the CRM system, someone from their team works as our network manager. Whenever we have an issue or a question, their team is responsive and innovative. LBMC really understands our business and the Dynamics CRM solution. With the Microsoft software and LBMC's help, we are operating much faster and more efficiently than we could in the past."