

## The Power of Data: Customized Case Management for Marcus & Mack

### Marcus & Mack

Pennsylvania Personal Injury Lawyers

For over 40 years, Pennsylvania firm **Marcus & Mack** has been focused exclusively on personal injury law. With over 100 years of combined legal experience, the attorneys at Marcus & Mack are relied upon by injury victims across Pennsylvania to vigorously fight for their rights.

With caring for others as the cornerstone of the firm's culture, Marcus & Mack's attorneys and support staff pride themselves on their commitment to resolve cases in the best interest of each individual client. So, when the time came to update their data infrastructure, Marcus & Mack sought the same personalized approach from their software implementation partner.

#### THE CHALLENGES

When attorney Russell Bopp joined Marcus & Mack in 2018, he began to explore ways in which the firm could better serve their clients by better utilizing their case management software. He began by asking the question: "What information and data is most important to us?" One thing quickly became clear.

"PracticeMaster is great for general practice, but a personal injury firm works differently. There were definite inefficiencies there, so we were not utilizing the power of the software," explains Bopp. "Since our firm solely focuses on personal injury cases, we needed PracticeMaster to be customized in order to support our specific processes."

Several distinct challenges were discovered. First, the firm's use of PracticeMaster was limited by platform's inability to capture and organize data in ways that met the complex and specific needs of a personal injury firm. Next, PracticeMaster needed to be customized in such a way that it could transition from a reference database to a reporting resource. Finally, thoughtful strategies would need to be employed in order to complete this customization without altering or losing important historical data.



**"Both prior and existing client data were major challenges for the project," shares Bopp. "We have so much data within PracticeMaster because it has been used by our firm for such a long time. It was imperative that any changes made to the current system did not destroy or alter existing data in such a way that it could not be used in the future."**

To address these challenges, Marcus & Mack turned to Attorney Computer Systems, with which the firm had been working for over 20 years. ACS consultant LeAnn Cottrell was certainly up to the task, but just as the customization project began, ACS joined Affinity Consulting Group, adding new variables to an already complex project.



## THE SOLUTIONS

Prior to engaging with Cottrell, Bopp knew that he wanted to leverage the power of the firm's data to drive informed decisions. But he was uncertain as to how the firm might tap into existing features or customization opportunities in order to maximize the firm's technology investment and build a strong data infrastructure.



**“We had a lot of initial discussions to make sure LeAnn clearly understood our business model and our vision for how we wanted to use PracticeMaster,” Bopp explains. “Additionally, we knew her guidance was going to be essential to understanding any potential challenges or implications for changes we did incorporate.”**

It was clear from the beginning that the best solution would be focused on personal injury practices—specifically, the different types of cases the firm handled and their unique requirements. Cottrell, now part of Affinity, would need to customize PracticeMaster so that the data captured for each case was dependent upon the nature of that case.

“The nature of our case determines the type of information that is required. We need different data for different types of cases,” Bopp says. “It wasn't that we couldn't continue to use PracticeMaster, it was that we needed PracticeMaster to know which type of case we were working on and adjust accordingly.”

The proposed customizations would provide the firm with a single, consistent way of capturing data by case type. This would not only improve the reliability and accessibility of the data within PracticeMaster, but also save time and enable Marcus & Mack to serve their clients even more efficiently.

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## THE RESULTS

Ultimately, Marcus & Mack’s goal of seamlessly transitioning existing client data into the new system—as well as organizing and collecting new client data into a single system in order to create a searchable database—was achieved.

The implemented PracticeMaster customizations now clearly tell the story of each and every client, with easy-to-access summaries of important information. “We were able to build a solution that allowed us to track, categorize, sort, and search so that we could slice and dice our data in the most useful ways,” says Bopp. “We now have reporting capabilities down to the specifics for each type of case we handle.”

While certainly it was important to gain short-term efficiencies, it was also imperative that customization decisions were made by considering their long-term impacts on the firm. From the start, Bopp says, Cottrell was committed to deeply understanding the firm’s processes and requirements in order to facilitate such decisions. “LeAnn clearly communicated limitations and obstacles so that I could make the best decisions up front.”

Bopp’s biggest takeaway from the project? “It was a big endeavor. However, our vision was achieved, and we were able to accomplish our goals of saving time, eliminating redundant work, improving our data quality, and ultimately enabling us to be even more responsive to our clients’ needs and provide them with the service they deserve.”

## ABOUT AFFINITY CONSULTING GROUP

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