

“We wanted a firm-management solution that fit us. Not vice-versa.”

One firm's path to 2B-LAW



THE FIRM

FRIER LEVITT ATTORNEYS AT LAW

Frier Levitt is a boutique firm providing specialized legal services nationwide to healthcare, pharmaceutical and life sciences organizations. The firm's 25+ attorneys, and 10 staff, manage roughly 1000 active matters.

THE PROBLEMS

PROBLEM 1

Over several years' time, Frier Levitt's matter management system for tracking time and billing (Time Matters) had proven increasingly incapable of growing with the firm.

“We'd stored so much data in the platform, we were very close to crashing it,” explains Jonathan Levitt, co-founding partner.

PROBLEM 2

The system wasn't cloud based, and couldn't communicate with the firm's Microsoft programs — producing data silos and bottlenecks.

“We're always monitoring a lot of cases at any one time. When we make promises to clients, it's critical for us to deliver. When a client calls and wants to know the status of a case, I don't want to search through hundreds of emails for an answer. Which is why we knew we needed a CRM solution. One that fits the way we work.”

Frier Levitt had two system requirements: It had to work within the Microsoft 365 environment. And it had to be HIPAA compliant.



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THE SOLUTION

“What set 2B-LAW apart from everything else was 2B Solutions’ willingness to customize it for us.”

*Bianca Cocco
Project Manager & Client Liaison
Frier Levitt*



In addition to a more robust system for inputting data and tracking time & billing, Frier Levitt wanted a collaborative way to manage matters across the firm. “We’d looked at about ten different systems by the time I found 2B Solutions,” Bianca remembers. “Their 2B-LAW product had as many key features as any other solution we reviewed, and it was built on Microsoft Dynamics CRM. So we scheduled a demo, and we were floored.

“Ultimately, what set 2B-LAW apart from everything else was 2B Solutions’ willingness to customize it for us. We’ve made several customizations, and they’ve been great about handling them very quickly. They even showed me how to make a lot of the customizations myself — which has been incredibly helpful. And time efficient.”

NEW INSIGHTS. IN RECORD TIME.

Prior to launch, 2B Solutions’ team helped Frier Levitt export their data from Time Matters into 2B-LAW — then set up tailored reports. Reports, Jonathan notes, that yielded an impressive new level of drilled-down insights.

“After we launched 2B-LAW, I challenged Bianca to run a report of every engagement letter sent in the last 60 days — by industry, date sent, if and when we followed up, the lead source, and a lot of other criteria. She was able to run the report with everything I asked for in a matter of minutes.”

MOVING FORWARD

The firm is working with 2B Solutions on additional system enhancements. “Now that our attorneys can see the possibilities with 2B-LAW,” says Bianca, “they’ll email me suggestions and requests.”

Jonathan continues, “2B Solutions has been amazing. They’ve really listened to what we needed, and tailored the system for us. Having 2B-LAW has been great. Especially for those of us supervising matters and other attorneys. Now we can all work together to serve our clients much better than we could before. Not only that, if we add just one more client this year, the system pays for itself.”



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Jonathan Levitt, Co-founding Partner | Frier Levitt



KEY BENEFITS

STREAMLINED PROJECT AND MATTER MANAGEMENT

2B-LAW automates many of the processes and workflows Frier Levitt had in place — making the firm more process and task-driven. They can now easily assign matters, get instant alerts & notifications, and make customizations on the fly.

EXPANDED INSIGHT AND INTELLIGENCE

Tailored reports and dashboards give partners a faster and easier way to monitor all matters, and get up to speed quickly. Moreover, deeper insights into their attorneys’ performance enables partners to make better strategic decisions for the firm.

SEAMLESS INTEGRATION WITH MICROSOFT PROGRAMS

Built on Microsoft Dynamics CRM, 2B-LAW enables users to access records without having to leave Outlook. E-mails can be flagged, and automatically linked to records within CRM. All of which helps centralize data, and eliminate data silos.

NO MORE LEADS FALLING THROUGH THE CRACKS

2B-LAW lets the firm manage potential client opportunities within a single, centralized system. Now, staff can quickly enter leads, assign responsibilities, track interactions and schedule follow-up activities. **Leads are no longer being dropped, and revenue is up. In short, 2B-LAW is paying for itself.**

EFFICIENT, COLLABORATIVE CLIENT SERVICE

Frier Levitt partners, attorneys and staff share and access real-time information on matters — from anywhere. With everyone collaborating to keep cases updated, when clients call attorneys with questions, they routinely get answers on the spot — without having to wait for other team members’ input.



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