

## Karl Truman Law Office finds **productivity** and **innovation** with Needles Neos

Case study



“A lot of companies claim to have the latest and greatest cloud product ... having gone down that path and come back, I am a firm believer in Neos and have already recommended it to many law firms.”

-Karl Truman  
Karl Truman Law Office

Karl Truman Law Office is dedicated to helping injury victims and their families — and the technology they use to power their cases needs to help them achieve this mission and deliver an unsurpassed client experience.

The multi-region firm serves clients in Kentucky and Indiana, where Karl Truman has deep connections and is very active in the community. An Army veteran himself, Truman helps veterans with disability claims and sponsors veteran recognition and assistance community events.

For twenty years, Karl Truman Law Office relied on Needles Desktop to manage cases more efficiently in the flourishing practice so their over 20 staff members could focus time on meeting client needs.

### Key results



Significant **time savings** through automated reporting and report subscriptions



**Seamless migration** from Needles Desktop to Neos



Notable **cost savings** compared to competitive cloud solutions



**Enhanced client interactions** with Neos texting and Activity Feed features

## A failed foray into the cloud with a competitive solution

When Karl Truman made the decision to switch the firm from Needles Desktop to a cloud-based platform, Neos was not yet available. Moving to a competitive cloud solution seemed like a simple enough project that would yield benefits, but Truman's experience with one of the top three cloud providers in the market was anything but positive.

"It was a tough decision after being a Needles user for so long, **but I decided to try a competitive product,**" says Truman. "**And, quite frankly, it was a disaster.** It took 12 months for them to try to convert our data and I had to dedicate two full-time employees just for the data migration."

Truman felt the pain of the migration to the competitive product in the bottom line as well. "It was a significant amount of time and money," says Truman. "The cost of the data migration, the cost I had paid for the licensing fee for a year upfront. We obviously didn't get any of that back. All the time and resources that it cost us, not to mention the labor cost of all of that — it was a significant loss."

Once the firm tried the competitive cloud solution, staff members were dissatisfied. "The learning curve was very steep," says Truman. "The calendar was very awkward because it was not Outlook-based. There was no internal messaging system. And overall, the functionality just didn't work well."

Once Neos became available from Assembly Legal, it didn't take long for Truman to realize what he needed to do.

"After the data migration, it still wasn't right. We just had a miserable experience and then after being in the other product for a few months I just decided we can't continue this. And I decided that we had to come back to Needles for the Neos cloud product."

## Direction change: a seamless move from Needles to Neos

Fortunately for Truman Law Office, and their customers, the migration to Neos was smooth sailing and getting onto Neos helped wipe away the losses the firm incurred by trying a competitive solution first.

The total cost of ownership of the product also saved the firm money. "Neos was significantly less than the competitor product," says Truman.

Rather than convert directly from the competitive solution to Neos, the firm made the decision to convert data from Needles Desktop to Neos. "**The data migration was almost instantaneous,**" says Truman. "Needles took care of all of it, and we didn't have to get employees involved in mapping data."



Additionally, it was easier for the team to get up to speed on the new product. “Being able to maintain most of the look and feel of what we’ve already been used to, the learning curve has been fairly minimal,” states Truman.

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## Key features that keep Truman Law Office customer-centric

To stay customer-focused, Truman Law Office depends on the efficiency that its case management software brings. This means seamless scheduling and client signature, easy-to-use checklists to stay organized, and more.

The features that the firm loved the most with Needles Desktop were reimaged and enhanced in Neos. “In Needles, we’re all used to the checklist,” says Truman. “So that’s been a huge benefit because it maintains a lot of the same functionality that we’re used to with Needles previously.”

Truman also notes that “the reporting is smoother and being able to automate reports is a big time saver because we don’t have to recreate it each time.”

Truman enjoys Neos’ calendar functionality that is directly based on Outlook. “I think that’s a smooth experience,” says Truman. “For example, I can make appointments on my phone, and they show up in Neos for other people. I can mark appointments as private so let’s say if I have a personal appointment, it blocks out the time, but other people can’t see what the appointment is.”



The firm also uses the Activity Feed features to get a snapshot of what's going on with a case and text messaging and e-signature to interact with clients. "Clients rely more and more on electronic communication," says Truman. "So it's important to be able to promptly send and receive text messages and emails."

For such an important case milestone as client signature, Truman likes the dependability that Neos has with its DocuSign integration.

"Some might question, well, why have an external program like DocuSign that's integrated versus having it built into the program?" says Truman. **"I have found the DocuSign integration to be much smoother because I like the DocuSign product and it's got more options and features. The competitor product that I had experience with did have a built-in electronic signature, but it really wasn't very user friendly. It didn't flow very well, and it didn't have the robust features that something like DocuSign has."**

Because Neos is fully cloud-based, working from home is no different than being at the office and new features are delivered to the firm automatically. "The cloud has tremendously helped our productivity and workflow ... It's right there just as if I'm at my office computer and it's made life easier for all of us," says Truman. "It's all done for us."

## Prompt and attentive support when needed

Making the switch from Needles Desktop to Neos, Truman was reassured with the same reliable Assembly Legal support team to help when needs arise. "Any program's going to have some technical support issues," states Truman. "But any time we've needed something, the technical support has been very prompt in responding. The last time I called the phone number I got someone right away, and they resolved my issue on the spot. Tech support has been very, very easy to work with."

Additionally, Neos provides an award-winning self-service portal with training videos, and knowledge base articles for quick answers. "The knowledge base and video training you can pretty much have on demand, and it's been very helpful."

## Words of wisdom from one attorney to another

Truman Law Office relied on Needles for many years, but it all started with advice Truman received when he first started focusing on personal injury practice litigation.

"A well-established personal injury attorney, when I was asking him for advice, he told me whatever you do — I don't care if you have to go mortgage your house — go get Needles."

While Truman certainly did not need to do that to get Needles, he is glad that he took this advice, and he has his own advice to other firms looking to shop for case management solutions.



Truman says that it should be a team decision. “Bring your whole team into the demonstrations,” advises Truman. “The scenarios I’ve seen that haven’t gone well is when the firm owner goes to a seminar and signs up for something without getting input from his support team.”

He also stresses the importance of talking to other users. **“I think the most important thing is to talk with users who’ve been through it. Because so many of the companies make big promises that they can’t keep. Particularly on data migration and usability.”**

When looking at providers, Truman emphasizes that reputation and credentials matter. “Look at the longevity. I’ve always felt it’s one of the strengths with Needles. And as we all know, technology companies come and go every day. I don’t think any of them has been around as long as Needles has.”

As Truman Law Office found, selecting a provider with a proven history was a better bet than testing out a less-established solution provider. “Look at the track record of the company and make sure it’s not just a shiny new object,” he says.

**“A lot of companies claim to have the latest and greatest cloud product, but I think just looking at the longevity of the company says a lot, especially in the tech world ... having gone down that path and come back, I am a firm believer in Neos and have already recommended it to many law firms.”**

Truman has done his research and plain and simple, Neos came out on top.

“I’ve looked at pretty much all of the options out there. I’ve done numerous demos ... I’ve researched and there’s just no reason to look anywhere else.”

## About Assembly Legal

Assembly Legal’s primary solutions — [Needles Neos](#), Needles, and Trialworks — are relied on by many of the nation’s premier plaintiff firms as well as leading family, immigration, and defense firms. With over **40,000 users** and **35+ years of experience** developing and supporting legal software, we are proud to help our users deliver better outcomes for more clients.

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