

# CARET Legal

## The All-Inclusive Answer for a Firm That Needs Remote Accessibility

### FIRM

Berdon, Young, and Margolis, PC

### LOCATION

New Haven, Connecticut

### PRACTICE AREAS

Commercial Law, Real Estate,  
Family Law, Personal Injury

### SWITCHED FROM

PCLaw

If the pandemic taught law firms anything, it was how critical it is to be able to access documents and systems remotely.

That was certainly the case for Peter Berdon, partner at Berdon, Young & Margolis, PC in New Haven, Connecticut. Since 1958, the business law firm has prided itself on delivering practical solutions for its clients in the areas of commercial law, family law, real estate, personal injury and more. At the same time, as a small firm, Berdon, Young & Margolis is always conscious of cost and staying within budget.

When the pandemic hit, Berdon and the rest of the firm realized it was finally time to replace their existing practice management software, an on-premises solution they'd been relying on to run their accounting and more for decades. They decided to make the switch to CARET Legal, a cloud-based legal practice management tool that gave the firm the accessibility and flexibility it needed to operate in remote times.

Berdon himself is one of the heaviest CARET Legal users at the firm. By his best estimate, out of a 10-hour day, he spends nine and a half hours in CARET Legal.

So why CARET Legal? "It's a great, comprehensive package," he says.

### The Transition to CARET Legal

Changing its major systems isn't something Berdon, Young & Margolis does lightly. In fact, the firm had used PCLaw practice management software for over 30 years before migrating to CARET Legal.

Of course, over such a long span of time, all practice management solutions including PCLaw evolved, as did the firm's use of technology. Originally, the firm used the software strictly for time, billing and accounting. As the platform added more front-office management features, the firm grew into using those as well, including the calendaring system, file management and, eventually, document management.



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However, the document and calendar management capabilities through PCLaw weren't as stable as the firm would have liked, and the reporting was antiquated. Over time, supporting that software in the office became challenging because such long usage had led to a very large database that was becoming increasingly expensive to manage on-site.

The proverbial straw that broke the camel's back was the lack of online accessibility when the pandemic hit. What the partners quickly realized during the early days of the pandemic was that they really needed easier remote access.

Berdon, Young & Margolis had started looking at other solutions a year or two earlier and was at the stage of evaluating options at that point. In looking for a solution, the firm wanted a package that included both accounting and front office management, and specifically one with built-in, robust legal and business accounting components.

For a year, the firm used NetDocuments, a cloud-based document management platform, as part of a larger planned migration over to CARET Legal. Unfortunately, users found NetDocuments to be a bit cumbersome. When the firm discovered the document management features of CARET Legal, however, it was decided that an all-inclusive package was the right answer.

Overall, the transition to CARET Legal was a smooth one. "The staff was great in terms of getting us set up," Berdon says.

## Reaping the Benefits of CARET Legal

So how has it been working with CARET Legal? "It is a lot smoother," Berdon says. "We don't have the problems we had with PCLaw, which was very network-intensive and would create a lot of system errors where we'd have to manage the servers."

The firm's staff have also enjoyed the migration to a paperless world where they can get the information they need to do their jobs more quickly. "There's certainly been less frustration in the office around having to find information, because it's a lot more readily available," Berdon explains. "The user experience is more natural, so it's easier to train new staff. I was training somebody yesterday on it, and they were really excited because it just worked and it's so intuitive."

**It's head and shoulders above everything else we considered. It's really a great program.**

In Berdon's mind, if you have even a rudimentary knowledge of general office skills, you'll be able to pick up CARET Legal very easily. The learning curve is about as simple as it gets.

For other firms considering CARET Legal, Berdon would recommend it – in fact, he already did to a good friend who was recently having similar challenges with practice management software. As Berdon told him, "CARET Legal is all-inclusive. It provides you with the information that you need, right at your fingertips."

Berdon, Young & Margolis is definitely enjoying the remote access capabilities now available with CARET Legal. "It's easy to manage your files electronically," Berdon says, "and quite frankly, the ability to access that information easily on your phone or iPad in a way that mirrors what you're looking at in the office is great." He particularly likes the ability to do time entries directly from his phone.

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CARET Legal's financial reporting features are another favorite of the firm because they are very easy to understand. The firm is also making effective use of the customer relationship management features, which is something it never had before. "When you get a call from a client and are able to look at their history, that's very helpful," Berdon says.

Overall, Berdon would recommend CARET Legal to other firms. "It's head and shoulders above everything else we considered. It's really a great program," he concludes.

