

A 40-year-old firm transforms from manual to automated, seeing **70% time-savings** on billing alone.

In 2015, Heidi Dodd bought out her partner — another milestone in the estate planning firm's impressive 40-year history. But Heidi and her then-paralegal-now-partner Kelly Wambold had to move Dodd & Wambold out of the past and practicing in the present.

Drowning in paper

"Previously everything was paper. Paper calendar. Messages taken on paper pads. An entire basement full of files in banker's boxes," Kelly says. **Dodd & Wambold** sought practice management software to organize their forms, coordinate staff communications and centralize the work of part-time staff. They tested a project management and CRM tool but didn't see advantages over their previous Microsoft system. Plus, they weren't getting the responsive customer support the firm needed.

From multi-hour to one-click tasks

Dodd & Wambold found the user-friendly answer to their paper problem with **Smokeball**. Firm staff take full advantage of Smokeball support to automate their forms. They're also diligent about entering matter information up front so that wills, trusts, court pleadings, and other **documents are generated with the click of a button**.

Additionally, **Smokeball Billing** revolutionized Dodd & Wambold's timekeeping and invoicing. Previously, the firm generated invoices in a Word document from notes in the paper file. Invoices took hours to create and were manually added with a calculator. Now, the staff's time is automatically tracked throughout the case. Invoices are generated in a few seconds, and Kelly just needs to review the final document. "We capture a lot more billing now because of the Smokeball system," she says.

An efficient, paperless future

With the help of Smokeball, Dodd & Wambold transformed from manual to automated and is the modern, efficient and cloud-based firm Heidi envisioned. By working smarter and more streamlined, Dodd & Wambold has increased their caseload and their profitability. And all those old banker's box files in the basement? They're scanned into Smokeball so conflict checks are improving, too.

"I can guarantee you Smokeball has definitely increased the [efficiency and] profitability of the firm."

"With Smokeball Billing, we're saving at least 60-70% of our time on invoicing and billing."

KELLY WAMBOLD, PARTNER, DODD & WAMBOLD