Michael Cowen:

This is Michael Cowen and welcome to Trial Lawyer Nation.

Voiceover:

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Welcome to the award-winning podcast, Trial Lawyer Nation, your source to win bigger verdicts, get more cases and manage your law firm. And now here's your host, noteworthy author, sought-after speaker and renowned trial lawyer. Michael Cowen.

Michael Cowen:

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We're going to start a new feature on this podcast. It's Ask Michael and Malorie anything. If you have anything you'd like to ask either Mallory or me, we're going to start doing an episode every couple months where we're going to answer your questions. So just send them into me at Michael, at CowenLaw.com and Mallory and I will answer them. Anything from legal strategy, marketing management, anything else in life you want to talk about, we'll be glad to talk about it with you. Again, ask Michael and Malorie, anything, just send us an email, we'll be glad to answer your questions. Today on Trial Lawyer Nation, I'm joined by my good friend who's a lawyer and also the Chief Technology Officer for Begum Law Group, Leon Dacbert. Leon, how are you doing today?

Leon Dacbert:

Doing great, Michael. Thanks for having me. I'm pretty excited to be here.

Michael Cowen:

Thank you. Yeah, we've been working on a transition between case management software systems and you've been taking up the load as chief technology officer at Begum Law Group and now temporarily for Begum and Cowen, and I really appreciate that and it's such an interesting process. I thought it would be useful to talk about it because some people have thought about, do I want to get a case management software system? Do I want to switch systems and go on to all that? So thank you for coming on.

Leon Dacbert:

Yeah, of course. I'm more than happy to be here. Thanks Michael.

Michael Cowen:

And before we dive in, I want to say a thank you to our sponsor, Law Pods. Law Pods produces this podcast for us. They make it easy. All you and I have to do is talk. They do all the editing, making the clips for social media, making sure we sound good, interrupting us if we don't, and they are great work with. So if you ever want to do a podcast, I highly recommend Law Pods.

Let's talk a little bit about your background. How did you get into becoming a chief technology officer as well as a lawyer?

Leon Dacbert:

Well, yeah, I was actually thinking about that last night, Michael, and throughout my life I've come to find out that I just like to know how things work and that passion, that pursuit of understanding how things work has kind of led me throughout my life of how the computers work. When I was young, when I was in fifth or sixth grade, I had a laptop and tinkering with that. I got an iPhone and then my first job out of high school was actually working at Apple Retail and I'm still practicing things I've learned in that experience. Then I wanted to know how finances work. I got a finance major at Trinity, wanted to know how the law worked. So I went to law school at St. Mary's, and found myself also with personal injury with Alex Begum being my brother-in-law. I've been seeing him what he was doing and found that pretty interesting.

Especially I was a car wreck victim myself back a dozen years ago. So when going through that experience, it perked an interest in law and that's how I wound up there. But to answer to your question of how I ended up as CTO. I was always the family tech guy and people would call me for this or that, and we had a little project but we wanted to get some client feedback, and so I was doing some litigation for Alex Begum Law Group, I implemented some software to get some feedback from our clients through different stages of the process. Worked out, rolled it out, got it done. Then the next step was intakes. How do we get an inbox from all of our leads and get the API configurations all into one place? Got that implemented, rolled it out.

The next natural progression was, "Hey, we want to go cloud for case management." And ever since that, project is still going on today and it's consumed my time to the point where I had to put a pause to my daily litigation work and do full-time CTO stuff.

Michael Cowen:

The traditional path is usually to get a tech person to do the chief technology officer and software implementation rather than a lawyer. What do you think the pluses and minuses of having a kind of techie lawyer versus a techie- techie who's non-lawyer leading the charge on this?

Leon Dacbert:

Right, so I'll start with the minus, is I don't program right? I don't know code very well. I know how to go through it, look at it, but produce it? Don't ask me how to do that. I don't know how to do that. The positives though is we all have pipelines, right? A case has a lifecycle.

Michael Cowen:

What do you mean by pipeline?

Leon Dacbert:

Yeah, a pipeline is kind of a beginning to end process, of it's going to be like the intake and then property damage for a motor vehicle crash. And then you have the treatment, you have the demand, possible litigation, and resolution, right? That's an example of a pipeline altogether.

Michael Cowen:

Yeah, I think that is important because one struggle I've had in working with vendors on implementing case management software is I've had non-lawyers and they don't get it. They don't get the way we do things and sometimes they'll, "Well that's how this other firm does it." I said, "Yeah, that other firm is a high volume pre-litigation firm that doesn't do much litigation." They're going to have a very different life cycle of their cases and wants and needs than what I have."

And I remember when I was first getting my dashboards they're like, "Well, we want to tell you how many cases in each city you have signed up or however... I don't care about that from my practice. I can see how other people that would be interesting, for referral based practice, it's not particularly useful. What the referral source was very useful, what city or what county it happened to be in, wasn't. I'm not making spending decisions based on mass marketing for that firm. So I found a lot of frustration working with people, trying to get them to build what I want and not understanding what I want. So I could see how that could be an advantage.

Leon Dacbert:

One other advantage on that, Michael, is that through the process I had to advocate for our firm and getting exactly what we wanted, and instead of just going through their own pipeline and ushering us through with the way the usual's would happen, and I had to get my advocacy on really passionately, respectfully explain to them that our why is not their why.

Michael Cowen:

Yeah. I've had to respectfully threaten to have some podcast episodes about our vendor a couple times to get them to keep some of their promises. So before I dive into case management software, it's something you said was really interesting to me. You said you developed something to get client feedback. Tell me about that.

Leon Dacbert:

Right. So we wanted to get client feedback based on the life cycle of a case. Again, intake is one, property damage is another, treatment, and then the resolution of the case. Those are the four stages we wanted to get touched on. And we looked through some software and one of them was Zonka Feedback. It's a small company and they are very passionate about what they do. We unfortunately don't use them today. We went on to Salesforce and Litify, but they're the perfect out of the box product for feedback of sorts. So you could do it manually, have somebody call the client, or you could have an automatic text be sent out.

Michael Cowen:

How do you spell Bonka?

Leon Dacbert:

Zonka.

Michael Cowen:

Zonka?

Leon Dacbert:

Yeah. Z as in Zebra, O-N as in Nancy, K-A. Zonka.

Michael Cowen:

And that's like, I guess software you can program to automatically either remind somebody or to send surveys to your clients at certain points in the case?

Leon Dacbert:

Right. So yes. So back when that was implemented, we actually had Needles, which is kind of a Web 1.0, older software that we could not connect to Zonka directly, but we were able to have some checklist items in Needles that would tell somebody, "Hey, go to Zonka and conduct a survey."

Michael Cowen:

And does Zonka integrate with any of the case management systems that are on the cloud?

Leon Dacbert:

They do. In fact, I looked at their Salesforce integration and I literally told them, "You need to teach other vendors how to do Salesforce integration." It was so simple.

Michael Cowen:

So were you involved in choosing the new case? You were moving from the old Needles that wasn't even on the cloud, the old Needles that was hosted on a server, you all wanted to move to the cloud. Were you involved in selecting the software?

Leon Dacbert:

I was kind of auxiliary to that. Victoria Switzer, our COO, was really leading the charge there. She came from a firm where they didn't have a cloud, some sort of software, and we just want to look at the vendors and see what they can offer and what flexibilities they offered for a long-term partner, because these contracts that we were signing are not short.

Michael Cowen:

So what are some things you advise us to look at? If we're looking at either first going into having case management software or we're frustrating with our current provider and we're thinking about switching, what is your recommendation for that search process?

Leon Dacbert:

So one part that I found interesting is what environment are you walking into? Meaning, if I'm buying this platform that's in front of me, what kind of vendors out there are there to support it? What kind of developers are out there to support it? And the reason I mentioned that is because we ended up going with Litify, which is based on a Salesforce product. And Salesforce, I think everybody knows what Salesforce is. If not, it's a-

Michael Cowen:

No, we don't. Go ahead and explain that.

Leon Dacbert:

Okay, sorry. But Salesforce is a product that's been developed over probably 12 to 15 years now and they're publicly traded, giant company. Most of the SAP 500 companies use them at some point. I know some these large insurance firms actually use Salesforce as well. It's just a giant platform that a lot of corporations are behind, and since there's a lot of money behind it, there's a giant ecosystem that Salesforce has around them for developers, vendors, and possibilities ultimately of what you can do.

Voiceover:

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Michael Cowen:

So what's it like working with the salespeople that are trying to sell you this product? Do they give you exactly what you need out of the box?

Leon Dacbert:

So these salespeople that are going to be coming in front of you, coming to your office, Zoom, they're going to be showing you the best product that they have developed in their demo, that they've worked over, over and over, and they know how to give a polished product presentation. Having somebody who's on your side who's able to pick apart and get to the how is really valuable to be able to understand what's under the hood, essentially. There's a saying in sales actually that I've heard is, "Close the deal, we'll figure out the rest later." And it's sort of difficult to get around that. But one thing that I've learned is get a demo account, and if they don't want to give you a demo account, don't do business with them.

Michael Cowen:

That's true because we almost went to the cloud with one product that we had their server-based product and they wanted us to go to their cloud-based product and they did not want to give me what we call sandbox or a demo. And I insisted on it, and the product frankly didn't work.

Leon Dacbert:

Right.

Michael Cowen:

It did not do what they said it did. And more importantly, it did not have many of the features that we had in the server-based product that were really essential for the way we ran our practice. And I was such a pain. I actually eventually talked to the coders and they said, "Well, the product is too customizable right now and too hard to support, so we want everyone to run it the same way." I'm like, "Well, your tagline was you were the customizable software." For 20-something years, that's how you built your business. And that business is unfortunately, my understanding is they've got about 15, 20% of

the number of users they used to have before they went to the cloud. Don't want to get sued, so I'm not naming names, but if anyone knows me personally, they know how much I hate... Because I loved the original product so much and then their new cloud-based product I hate so much.

And just all the lies I was told, I mean I was talking to vice president level people, they would tell me things and they just wouldn't be true. And then I talked to the tech people, they'd say, "No, that's not true." It just was a very, very frustrating experience. But I'm glad that we demanded that because we would've gotten stuck with a product that didn't work and would've caused great harm to our business.

Leon Dacbert:

Right. Good think you had that sandbox. Without that sandbox. And by the way, this is a lesson learned on experience. It was a product, I can't remember what it is, but I did not get a demo and I regretted it, kind of put it in my book of rules from here on out.

Michael Cowen:

Absolutely. The other thing I found when I was with a software we're currently with, and I'm relatively happy with it, it does what we need, but it didn't do what we needed out of the box. So we had all these sales meetings and again, we're a bigger account, so we're meeting with people pretty high up on the company and they're showing us all this really cool stuff it can do and we're brainstorming and I'm all excited, sign the contract, and then I find out that I just get a blank software system that we have to program ourselves with no support. And I'm like, then we're paying by the month for something useless.

And again, I think if I didn't have the Trial Lawyer Nation platform, that problem wouldn't have been fixed. But we still had to spend a lot of money to basically program out the software they sent us, because they just kind of sent us... They basically told me a toolbox and said, "Now you need to go learn how to use these tools and learn how to build software." I'm like, "I'm a freaking lawyer. I don't want to build software."

Leon Dacbert:

Right. Exactly Michael, and I'm glad you brought that up. So that actual setup is not uncommon. There's always a platform and then there's always an implementer. Sometimes the implementer is in-house with the platform you're with, more often that implementer is outside of the platform. So the platform guys are selling you the monthly users. They're just kind of hands-off say, "Hey, talk to your implementer." And then implementers are people that you're actually going to work with every day, every week to get projects done and out the door.

Michael Cowen:

And that's what we had to do. And I know that's something you guys have had to do too with Begum Law Group and now with our Begum account. Actually, we buy the software from one company and then we have to hire a different company to make the software work, which seems insane to me. It seems absolutely nuts to me. But it's I guess what you have to do now.

Leon Dacbert:

Yeah, it is. I think it's perhaps a liability thing of, well, we're showing this, the implementation off somebody else, not the product. But let me tell you, so the counter to that of why that is the best setup is, we want a product to our. Why do we have the product that we have and the why do we have it set up to way we have it? The only way to really do that is to have a platform that is they could bend over

backwards. The problem with that is there are so many options and so many ways to do something that you do need professional there to really guide you along on how to get you exactly what you want. Another platform like Clio or some other, not to call them out, but some other platform that's a little more perhaps not as many options, they don't have an implementation team, but there's not as many options to get what you do every day.

Michael Cowen:

Okay. So you have these really powerful software systems that can do a million different things in a million different ways. How do you figure out what you want it to do? Do you try to get everything at once and every possible feature before you launch?

Leon Dacbert:

No. So it's pretty tempting to do that, right? You get the sales presentation to show you a dashboard, beautiful ways to do your business and they give you the toolbox and say go. But all those dashboards are vital, and I can't say this enough, are vital to make sure that they're built on data that is correct and real because you want your cloud management system to be the source of truth. And that requires a lot of work on the back end to make sure we get right.

Michael Cowen:

Okay, what are dashboards?

Leon Dacbert:

Yeah, so dashboards are kind of like a scoreboard, right? You're at a basketball game, you see the points, how many the San Antonio Spurs have versus the Warriors, and then you have, if you look at the scoreboard, you could see each person's, that's on the court, points, rebounds, steals, all that. It's the same thing for a law firm. You could see how much your year-to-date gross revenue is, how many cases you have, what inventory you have in terms of cases and case value. It's kind of like a one-stop shop of what you want to see everyday to run your business.

Michael Cowen:

And what do you mean by you have to make sure that the information on the dashboards is based on data, that's quote, "Correct and real" unquote?

Leon Dacbert:

So data entry in the tech world is everybody's Achilles heel. In fact, I think I was listening to Brian Glass I believe, and y'all were talking about somebody was checking something off that they didn't do. That's bad data. And how do we get around that? And you don't want to make a decision based on bad data, just that inherently will be a bad decision.

Michael Cowen:

How do you make sure that your data is correct and real? That people are actually entering the data one and then two, that they're telling the truth and not making mistakes?

Leon Dacbert:

Right. So there's this give and take strategy I do, and it's been working out really well. That is, you give something of value to the user, they will use it to their benefit. And since they're using it to their benefit and giving you correct data, now I'm getting the correct data on the high-level items.

I'll give you an example. We have a medical submission pipeline we put together, and it used to be, put a email together with about 15, 20 items that are going to be the property damage amount, the damages of the case, how much is owed, the type of case it was, the client's name, et cetera. Pretty long email. Now that these medical coordinators had to actually type out their own, send it out to management, get the case assigned and go from there. What we did was we took all those data points that they were typing out, retyping out and generated that email automatically. Saved them 10, 15 minutes. And just by giving them that 10, 15 minutes value, they're using it and happy to use it, and now we can get some actual data on how long does it take from when the client's been treating to when the medical breakdown submitted, and the amount of time now is actually kind of correct.

Michael Cowen:

So I want to go back and revisit a earlier question, which is, okay, so you're going to get ready to transition or start and you've got a million things you could do. How do you decide what to do? As far as what features, what programs, what documents you're going to program in at the beginning?

Leon Dacbert:

Sure. So you need to take a good hard look at what we do today. What are the ways we submit a medical breakdown? What are the ways we do handle litigation today? And just copy that. Literally copy what you do in the day and put it into the cloud into whatever system you pick. The reason I say that is because that data is there, right? And I guarantee you're going to go through that data and start doing the mapping on the fields and you'll realize, "Oh, hold on. That field is not being used correctly." And you'll know that with this new cloud software you're doing because you could do some reporting on that. And since the approach is just to copy it over, that transition on go live date and when everyone has to keep using the new software, will be more natural and you'll have more buy-in. So the last thing you need is to have a new case management software and new way to do things.

I remember being kind of knocked out and I remember being kind of thrown into the water and not knowing what's going on, and good thing my brother-in-law, Alex Begum was able to help me out on that. And him and his staff was able to guide me through that and make sure that I was taken care of. That experience is what drives me through personal injury. Is making sure provide clarity on the why, on what's going on with you and your case, and how could we help you the best way possible to get you out of this and get this behind you. That's what drives me, and that's what also drives me on this technology because if we have better technology, a better client experience that provides more clarity to the client and to the employees, everyone's better for it.

Michael Cowen:

Absolutely. And I think that's the key is making the technology create a better experience for the clients and the employees instead of one more extra task to do every day for the employees.

Leon Dacbert:

Exactly. It's truly attrition, it's truly trying to get a... You have your water and you boil it down to its core, the most important factors.

Michael Cowen:

Well, sounds great. Well, Leon, thank you so much for joining us. I've really enjoyed working with you on this and I'm hoping our listeners are getting something out of it because we all do need to implement a good case management software system that actually makes our employee and client experience better rather than worse. And I appreciate your efforts and look forward to not just working with you on the technology, but then litigating with you once you can take the CTO hat off and join us back in the courtroom.

Leon Dacbert:

Sounds good. Michael, thank you so much for having me here. I really enjoyed it.

Michael Cowen:

And thank everyone else. Join us next time on Trial Lawyer Nation.

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