

NEEDLES CASE
MANAGEMENT

SPECIAL
POINTS OF
INTEREST:

- Is your firm our next “Client of the Month”? Let us know if your firm has recently celebrated an accomplishment.
- Did you know needles.com now features a media center? The new page highlights client video testimonials!

INSIDE
THIS ISSUE:

President’s Letter cont’d	2
New Faces at Needles	2
Meet the President	2
Tradeshow Schedule	3
Usergroup Recap	3
Tip of the Month	4

Sidebar Newsletter

VOLUME 21, ISSUE 3

4TH QUARTER 2008

Letter from the President

Dear Needles Clients and Friends:

First and foremost, thank you for selecting Needles for your case management needs. As I embark on this exciting new beginning as President and Owner, I’m comforted to know that the Needles name is unparalleled in the business and that Needles clients are such loyal champions of the program.

As you know, Burt Bank set out nearly 25 years ago to create a software solution for attorneys. He pioneered legal case management before most law firms even had computers on their desks! He had the vision and the drive to create a superior product and back it with unparalleled support. I am proud to be passed the torch that Burt Bank lit: a torch that symbolizes innovation, client service, and dedication to excellence. Please have no doubt that Needles will continue to provide your firm with the rock solid software, support, and training that people have come to expect from this company. Burt will continue to offer his advice, his guidance, and a friendly ear as he begins a new chapter in his life. I think you will all agree that Mr. Bank deserves tremendous respect for accomplishing all that he has.

I recently had the great pleasure of attending the Needles: The Next Generation Usergroup meeting in Baltimore. It afforded me the opportunity to meet quite a few clients, see our staff hard at work, experience some phenomenal client and vendor speeches, and most importantly, to see firsthand the excitement, buzz, and camaraderie that is the Needles Case Management community. If ever I had any doubts as to what I may have gotten myself into, I needed only to step one foot in that usergroup meeting door! I had heard the rumors about the Needles cult-like client base, I had suspected we had some pretty savvy law firms who had truly taken Needles to a level Burt never even dreamed of when he started with the PINS program, but I still couldn’t help but be blown away by the “next generation” atmosphere among the client base at that meeting. As a company, we could not ask for a better, more spirited group of clients. We intend to continue to offer you the tools you deserve to elevate your firm.

I think it goes without saying that I am not embarking on this journey alone. I can so confidently promise you an uninterrupted level of superior support and training because I have a solid team behind me. Our dedicated staff is responsible for the success we have attained, and they are the reason that we continually receive positive feedback from our clients. I have the highest regard for our team and am excited about the future. This is truly the “next generation” of Needles... a generation of youth, passion, drive, and client focus.



(cont'd from page 1)

As we look at the world around us and consider the state of the economy, it's hard not to think about areas to cut back. Thankfully, your firm, as a dedicated Needles client, already has the tools in place to increase efficiency and decrease the "time on desk" of a case file. Needles training is a small investment for the efficiency you can gain by properly using the program.

To those who are current Needles customers, I would like to personally thank you for being a part of the Needles family. To those looking at our company for the first time, we welcome the opportunity to provide you with premium quality service and add you to our list of satisfied clientele. I look forward to getting to know you, to know your firms, and to know what we can do to make you successful. As always, please let us know how we're doing and if there's anything we can do for you.

With thanks,



Bryan Billig
President, Needles Inc.

New Additions to the Needles Staff



Joe Zanta joins the Needles team as our Regional Sales Manager. A Pennsylvania native, Joe received his Bachelors in Education from University of Scranton and his Master's from Kaplan University. Joe taught children from grade K-12 before changing to a career focused on sales and technology. He has previous experience as an IT recruiter and in security and software sales. Joe currently resides in Fells Point in Baltimore City with his dog Rocky. When Joe isn't at Needles, he is an avid sports fan. He enjoys both watching and participating in football, baseball, hockey and cycling and has competed in multiple marathons and triathlons. He has traveled to England, Canada and Mexico, but mostly enjoys spending time with his family.

Meet the President



Bryan Billig has a long history with the Needles family, having been involved with and spending a good deal of time here at a young age. Burt Bank, the founder of Needles and a very successful businessman, has been a long time mentor of Bryan and the two have enjoyed a business association spanning over 2 decades. Bryan is Baltimore born and raised. Shortly after graduating from Syracuse University, Bryan moved to New York where he purchased his first company. Bryan ran and grew the company by leaps and bounds. Ultimately, he sold it to a larger agency and stayed on to run the new division for two years. Bryan is looking forward to his next chapter as President of Needles, a welcome change that brings him back to the Baltimore area and to the Needles family.

Administrative Director Michael Snyder had this to say about Bryan's arrival, "The staff at Needles is extremely pleased with Bryan Billig as our new President and CEO, as this signals our ability to continue to deliver unequalled support." Mary Ellen Bellusci, Marketing Director at Needles, added, "When we chose "Next Generation" as our theme and mantra for this year's usergroup meeting, we had no idea how perfect a theme it would turn out to be. Bryan Billig truly marks the next generation of Needles Case Management. He is first and foremost a member of the Needles family, and as such, he is familiar with the philosophies, atmosphere, and extreme potential of the Needles program. I speak for the entire staff when I say thank you to Burt Bank for building this company and welcome to Bryan Billig!"

2009 Needles Tradeshow Schedule*

The Needles' Sales Team travels the country educating groups regarding the importance of implementing a comprehensive case management system. If you know someone who could benefit from implementing Needles, please encourage them to visit one of the following events:

- 📅 **M&L Legal Management** - January 15-17, 2009 - Four Seasons Great Exuma - Emerald Bay, Bahamas
- 📅 **Legal Tech New York** - February 2-4, 2009 - The Hilton New York - New York, NY - www.legaltechshow.com
- 📅 **AAJ 2009 Winter Convention** - February 7-10, 2009 - Sheraton New Orleans - New Orleans, LA - www.justice.org
- 📅 **ABA Tech Show** - April 2-3, 2009 - Hilton Chicago - Chicago, IL - www.abanet.org/techshow
- 📅 **ATLA New Jersey Boardwalk Seminar** - April 23-24, 2009 - Ballys Atlantic City - Atlantic City, NJ - www.atlanj.org
- 📅 **ALA Annual Conference** - May 18-20, 2009 - New Orleans Morial Convention Center - New Orleans, LA - www.alanet.org

*We are always updating our trade show schedule. Please visit the Client's Only section of www.needles.com for the latest schedule.

Needles: The Next Generation



Thank you to everyone who attended our Needles: The Next Generation 2008 Usergroup meeting in Baltimore! This event went down in history as our largest usergroup meeting to date. We welcomed over 200 clients from more than 100 law firms nationwide. In addition to announcing the passing of the Needles torch from Burt to Bryan, we welcomed some fantastic speakers. Special thanks go out to Frank Strack, Carter Mario, Rick Koch, Todd Kuhlman, Rick Borstein, Cindy

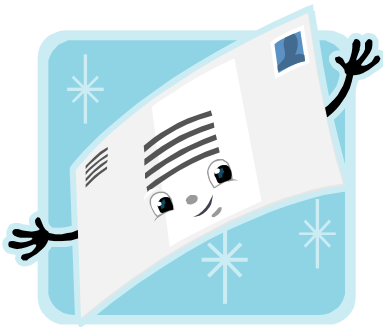
Speaker, Jonathan Stark, Daniel Rosner, and Joe Weber. Without you, this meeting would not have been the forward thinking, idea sharing, next generation gathering that it was. These speakers let us have an inside peek into their law firms or their businesses to help us all learn and grow together. Needles is proud to be able to offer free meetings to our clients. They represent an excellent opportunity for firms to network and gain information that may be helpful to their practices.

One recurring theme in our Next Generation seminar was the importance of investing in training for your firm. Compared to the benefits, the investment in Needles training is minimal. Those firms who were featured as speakers during the meeting certainly know the importance of working with a Needles trainer, and the results of those training sessions shined through in the excellent examples.

If you have feedback on the meeting or ideas for future meetings offered by Needles, please do not hesitate to contact Mary Ellen at mbellusci@needles.com



Tip of the Month



It's hard to believe, but the holidays are right around the corner! As your firm prepares for an annual holiday mailing, the following instructions for generating mailing labels may be helpful.

Select from: **Party Labels** **Provider Labels** **Case Intake Labels**
 Party Birthday Report

With our Party Mailing Labels report, Needles provides you with a means of contacting all or a select group of clients. Limit the report to names starting with a certain letter or group of letters. Create a monthly birthday card mailing, a mass mailing to minors or seniors, or any other selected group. You can limit the mailing to a specific city, county, state or country, or enter a range of zip codes for the labels. You can even select and preview several different label layout formats.

Our Provider Mailing Labels can be used to contact experts, adjusters, vendors, or any other group of providers. Limit the report by provider specialties, geographic location, or some other group. Needles provides you with a quick, efficient way to extract this information from your database, freeing you up for more important tasks.

Did you know that Needles can help you with marketing, too? Use the Case Intake Labels to send thank you letters to referrals sources or to send mass marketing letters to parties from rejected intakes.

Need a list of clients celebrating a birthday in a particular month? With our Party Birthday Report, Needles provides you with a listing of parties whose birthdays fall with a selected date range. Needles makes it easy to limit the report by party role, demographics, case type or other criteria.

To generate mailing labels in Needles, from the Needles toolbar, click on **Reports > Mailing Labels**. Let's look at Party Mailing Labels.

The default for **Party** is set to **Our Client YES**.

Select from the standard criteria/filters for the information desired from the following tabs:

Party Info **Mailing Lists** **Case Info** **Party Roles** **Staff** **Case Types** **Address Info** **Class Codes**
 ID Codes **Sort** **Layout**

Click **OK**. The report will print in Avery mailing label form in 3 columns of 10 names, 30 names to a page.

To print the labels, click on the printer icon which is located above the report, to the left of the label address field. Click on **PRINT**.

To **SAVE** the report, click on **Print icon**, check **Print to File**; then click on **Print**.

A **Save As** window will open; click on the arrow to the right of the **Save in:** field and then browse to the directory in which you want to save the report.

In the **File name:** field, **Name** the report and then click on **Save**.

*If you want to save the report in Excel format, click the arrow to the right of the **Save as type:** field and select **Excel with Headers**; then click **Save**.*

To close the report, click on **Close** in the right top corner of the report.

To learn more about the Needles mailing label feature, visit the Needles user manual or call 410-363-1976 to schedule time with a trainer. A trainer can show you the many filters available for mailing label reports.



"I wanted to express my continuing appreciation for your staff's excellent support and service over the years. Without exception, everyone has always been knowledgeable, friendly, and helpful."

-Larry King
Law Offices of Larry King
Newport News, VA