

# Sidebar

## President's Letter

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*Reputation is the key to  
your very business success.*

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Dear Friends:

We have a saying at Needles: Selling to your client base begins AFTER the original sale is made.

We readily and happily admit that our own clients are involved in our sales almost 90% of the time. Their involvement could be:

- ✓ Actually referring a prospect to us.
- ✓ Allowing us to use their name and phone number on our website.
- ✓ Conducting a Needles demo in their office for a friend and prospect.
- ✓ Sending us a letter of praise/testimonial for the Needles product.
- ✓ Stopping by the Needles booth at a trade show to tell anybody within earshot about the Needles use in their law firm.

Having been in business for over 22 years, we have watched (and smiled) as this phenomenon took place and actually doubled and tripled in size before our very eyes. It soon became very clear that since many of our sales were coming directly or indirectly from our own client base, we needed to make sure that our clients were nurtured with love, concentration, awareness and most of all **appreciation!**

What we are really discussing is **client service**. For years, we have striven to go above and beyond what a typical case management system does and offer our clients more than just the basics. Below are just a few of the ways we nurture the Needles client base:

1. Chocolates! We never realized what a powerful tool a box of candy could be. We send the now-famous Needles candy not only to all new accounts and to those clients with special accomplishments, but also to any client who refers a prospective client to Needles. It is our way of saying, "Thanks for a job well done!"
2. Training. We hope that by offering several training options, including onsite at the client's office, here in our Baltimore headquarters office, or over the Internet via WEBEX, we are providing a valuable client resource.
3. Seminars. By offering a host of educational opportunities, we hope that we are giving our clients a chance to excel at Needles use and get the program running efficiently, effectively, and profitably.
4. Clean Sweep. We know that clients who have had the Needles program for many years may have a database that needs work. Perhaps there is old data, workarounds, unused fields, etc. We offer Clean Sweep to give clients a fresh start at an optimal database.
5. Online Hotline. This new concept, featured in the Clients Only portion of our website features a series of short, downloadable videos that can be paused, rewound, and watched as many times as necessary from the comfort of your own office. This **free** resource feature a series of hot issues, such as creating a Status Tab, Managing the Value Tab, Marketing with Needles, etc.
6. Consulting Services. With more than 1600 law firm installations nationwide, our support staff has seen their share of law firm management techniques. We have spent years networking with law firm marketing companies, and we know what it takes to get a law firm up and running successfully. Our team is available to help your firm find and use the resources necessary to "run a tight ship".
7. Report Writing and Document Coding Services. In addition to our regular trainings, we have specialized staff to write reports and code documents for your firm at a small fee.

Once we realized the importance and success of cultivating relationships with our own client base, it took only a moment to realize that our clients are in the exact same position with their client base! And, would it not be a good thing if Needles and our company could assist our clients in relating to their clients in a more positive manner than they are at the present time?

We certainly realize that all attorneys, to some degree, are aware of the impact of the client relationship. Many provide small gifts such as cards, pins, calendars, etc. to their client base to keep the firm at the top of client's mind. However, what we are talking about transcends the basics and attempts to use Needles: the powerful Case Management Tool, as Needles: the powerful marketing tool to improve

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## President's Letter

(continued from page 1)

client relationships.

The following is just a small list of ways our clients can use their Needles Case Management System as a marketing tool (and the list is limited only by your imagination and creativity with the system):

- ✓ CRM (Client Relationship Management)
- ✓ Status Screen
- ✓ Birthday cards to clients
- ✓ Managing the Intake Process
- ✓ Using Needles Reports to glean information, like referral sources, success of marketing campaigns, client base specifics, etc
- ✓ Mailing lists for newsletters and other important announcements

"Client Marketing" is truly a win-win situation. Not only do you keep your clients happy and probably get yourself more business from this group alone, but your clients can provide new business which is truly the life blood of your firm. And to make things even better, growing a relationship with clients is something the clients themselves get caught up in. They enjoy their piece of the firm and appear to derive pleasure out of the overall camaraderie that develops.

One final thought! What would you guess is your most important asset as an attorney; as a law firm; as a business enterprise? We know you know the answer, and it is a simple one: REPUTATION!!! Reputation is the key to your very business success. How do you get a positive reputation? We just told you. Hug your client. Take care of your client. Smile at your client. Go out of your way for your client. **And really mean it.**

Burton L. Bank  
President  
Needles Case Management Software

## Associated Software

- **Adobe** - To create the template, you will need Adobe Acrobat 6 or 7 Professional. To merge information from Needles into a PDF document, you may use Adobe Acrobat 6 or 7, Professional, Standard or Reader versions.
- **Corel WordPerfect** - versions 8, 9, 10, 11, 12, X3
- **Docs Open** - version 4
- **E-mail** - Any Mapi-compliant email program.
- **Hot Docs** - version 5
- **iManage**
- **MediConnect.net**
- **Microsoft Word** - versions 97, 2000, 2002(XP), 2003
- **Timeslips** - versions 10, 10.5, 11, 2004, 2005
- **PC Law** - versions 4, 5, 6, 7.05A, 7.22, 7.50 or higher. **Please note:** Only Needles versions 4.65 or higher integrate with PC Law versions 7.50 and higher.
- **PDA** - Any PDA running the Palm OS with Palm Desktop Version 4.10
- **Peachtree** - versions 7, 8, 2002, 2003, 2004
- **QuickBooks** - Pro, Premiere, and Enterprise Solutions- versions 2001 and higher. **Please note:** The bidirectional interface in Needles 4.65 is compatible only with versions 2004 and higher. (Neither integration works with QuickBooks Basic, Simple Start or online.)
- **Outlook** - versions 2000, 2002, 2003
- **Worldox** - versions 2000, 2001, 2002(XP), GX

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*...Needles: the powerful  
Case Management Tool...*

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## Clean Sweep

Does your Needles system:

- accurately reflect the way your firm practices?
- contain fields or checklists items that you no longer use?
- contain a growing number of duplicates coupled with a decreasing number of merge documents?

Or, are you generally frustrated by the lack of consistency within your casetypes? If so, it may be time for a Clean Sweep. The newly revamped and improved Needles Clean Sweep process modifies, updates, enhances and redefines your database in order to efficiently and easily support the way your firm practices today.

To learn more or schedule a Clean Sweep, contact Michael Snyder at (410)-363-1976.



## New Face

Kristen Michaelides joins the Needles team as an Administrative Assistant. A Maryland native with family ties to Cyprus, Greece, this self-proclaimed "Navy Brat" lived in San Diego, CA and Jacksonville, FL before relocating to Owings Mills, MD. With an Associates Degree in Arts and Science from the Community College of Baltimore County and 7 years of management experience, Kristen brings her human resource training and sparkling personality to the Needles team. In her spare time, she enjoys spending time with her AMAZING young son Landon. This single mom also enjoys photography, vacationing, walks with her black lab, decorating, live music & concerts, trips to the beach, going to Baltimore Orioles' games, watching football, (Go RAVENS!), and NASCAR along with most outdoor activities. When asked to share her life philosophy, Kristen said "Dream as if you'll live forever, live as if you'll die today!"

## “Knowledge is Power” Seminar Client Quotes

Check out what past attendees have said!

- “I thoroughly enjoyed everything about the class. I feel much more confident and am excited about the new things we can offer our staff.” – Beverly Suhre of Allen, Allen & Allen of Richmond, VA
- “Everything was wonderful. I learned so much. I like having small groups to be able to ask questions and get more individual attention.” – Robin Suggs of Brantley, Jenkins, Riddle, Hardee & Hardee of Greenville, NC
- “The seminar was very informative. I feel that a great deal was accomplished.” – Sandi Shane of Carabin & Shaw of San Antonio, TX
- “Since the seminar, we are 98% complete with merging documents into Needles and everything is running great. Thanks for all of your help.” – Manny Alvarez of Alex Alvarez, PA of Coral Gables, FL
- “I was very impressed by the knowledge Sherryl has and her ability to convey it to us on a level we could understand.” – Melanie Ramsey of Grimes & Teich of Asheville, NC
- “I loved this seminar! Sherryl did an exceptional job of explaining foundations, answering questions, encouraging and troubleshooting.” – KayDawn Dortch of Norris Injury Lawyers of Birmingham, AL
- “The teaching was very detailed and informative. I was able to cover some of the issues our office is dealing with and obtain ideas on how to handle them from Sherryl and other members of the class.” – Michelle Clouatre of E. Eric Guirard & Associates of Baton Rouge, LA
- “This seminar was by far the best one I’ve attended. I learned such great things about Needles.” – Hans Jeannitte of Michael Demayo – Attorney of Charlotte, NC
- “I walked away not only understanding but able to repeat what I learned.” – Joyce Russ of Koskoff, Koskoff & Bieder of Bridgeport, CT
- “The boss is seeing the fruits of his money by sending us to Maryland!” – Debbie Dante of Grimes & Teich of Asheville, NC
- “I now have a much better working knowledge of Needles.” – Missy Franklin of E. Eric Guirard & Associates of Baton Rouge, LA
- “Sherryl was very knowledgeable, easy to communicate with and a joy to learn from.” – Eric Niccolai of Michael Demayo – Attorney of Charlotte, NC
- “Staff was great! They made us feel welcome. Seminar was very helpful.” – Cindy Garcia of Bailey Law Office of Memphis, TN



## Needles Corporate Calendar

### 2007 Educational Seminars Schedule–

The “Knowledge is Power” seminar series has been extended. Taught by Certified Needles Trainer Sherryl Coleman, the seminars will teach both attorneys and staff members to take their use of Needles to the next level.

To register or for more information, contact Elease Sanders at (410)-363-1976 or via e-mail at [esanders@needles.com](mailto:esanders@needles.com).

Featured events include:

- “Basic User Defined Report Writing: Getting the Most Out of the Needles Report Writer” held on:
  - July 12-13, 2007
- “Beyond the Basics” held:
  - June 14-15, 2007
  - July 10-11, 2007
- “Needles and QuickBooks: Setting up and Using the New Interface” held on:
  - June 26-27, 2007
  - July 24-25, 2007
- “Using Needles to Manage Your Business- A Seminar for Attorneys” held on:
  - June 12-13, 2007

Interested in learning more about Needles, but don’t see your subject listed? Submit your suggestion to [esanders@needles.com](mailto:esanders@needles.com). Who knows? Other Needles users may be interested in the same thing!

### 2007 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:

- June 14-16:
  - VA State Bar Lawyers Expo held at the Cavalier Beach Club in Virginia Beach, VA
- June 22-23:
  - Professionally Speaking held at the Hyatt Regency in St. Louis, MO
- July 14-18:
  - ATLA Annual Convention held at the Hyatt Regency in Chicago, IL
- July 19-20:
  - NFPA 2007 Tech Institute held at the Omni William Penn Hotel in Pittsburgh, PA
- September 6-9:
  - Consumer Attorneys of Los Angeles held in Las Vegas, NV
- October 5-6:
  - Network Affiliates Meeting held at the held in South Beach, FL
- October 10-14:
  - DRI Annual Meeting held at the Marriott Wardman Park in Washington, DC

## Needles Partners – Local Hardware Support Vendors

Clients often contact our office seeking information regarding local hardware vendors support personnel. In response to these requests, we've created the "Needles Partners" program. "Needles Partners" are vendors who provide, or are interested in providing, hardware support to Needles clients. In many cases, these vendors may have experience supporting the hardware required to operate the Needles Customizable Case Management Software program.

### Current Needles Partners:

- |   |   |
|---|---|
| • ABT Technology, Inc.                        | Website: <a href="http://www.abttechinc.com">www.abttechinc.com</a>       |
| • CFP Consulting, Inc.                        | Website: <a href="http://www.cfpcons.com">www.cfpcons.com</a>             |
| • Computer Mate Systems & Service             | Website: <a href="http://www.computer-mate.com">www.computer-mate.com</a> |
| • CT Technology Consultants, LLC              | Website: <a href="http://www.cttechcon.com">www.cttechcon.com</a>         |
| • Data Troop LLC                              | Website: <a href="http://www.datatroop.com">www.datatroop.com</a>         |
| • Groupwhere Consulting, L.L.C.               | Website: <a href="http://www.groupwhere.org">www.groupwhere.org</a>       |
| • ICS – AKA, Stevens Churchill Communications | Website: <a href="http://www.icsdallas.com">www.icsdallas.com</a>         |
| • Key Tech Group, Inc.                        | Website: <a href="http://www.keytechgroup.com">www.keytechgroup.com</a>   |
| • Network Alternatives, Inc.                  | Website: <a href="http://www.nextstepsys.com">www.nextstepsys.com</a>     |
| • Next Step Systems Integration               | Website: <a href="http://www.nextstepsys.com">www.nextstepsys.com</a>     |
| • Powersolution.com                           | Website: <a href="http://www.powersolution.com">www.powersolution.com</a> |
| • Technodem Computer Consultants              | Website: <a href="http://www.technodem.com">www.technodem.com</a>         |

#### \*Please Note:

The "Needles Partners" program is an informational service. By listing these individuals or companies, Chesapeake Interlink, Ltd. is in no way, implied or otherwise, endorsing the work of the vendor. As with any hiring decision, please conduct a thorough interview with the vendor and confirm that the company's services provide the assistance and information necessary to support your firm's hardware needs.

For additional information regarding the program or any of our Partners visit us online at [www.needles.com](http://www.needles.com) > Needles Partners or call (410)-363-1976.

## Needles Online Hotline

A new resource is now available to clients. Located within the Clients Only section, the Needles Online Hotline features several "hot" topics through short, downloadable videos. The "mini-training" videos may be accessed at any time, day or night. With the ability to pause, rewind, and watch again, the videos are an easy way to learn about Needles from the comfort of your own home or office. Sample topics include: Customizing Your Needles Display, Setting up a Status Tab, Using the Needles Value Tab, Marketing with Needles, and more! Free to all clients on our support program, this is a useful and easy tool for learning about Needles.

## Needles Training Resources

For over 23 years, Chesapeake Interlink, Ltd. has worked to "provide the best Case Management Software, training and support to the legal profession on a client by client basis." It is our hope that **3 New Needles supplemental services and training options** will help us accomplish this goal and take your firm to the next level of Needles proficiency.

**[Needles Report Writing Training/Service](#)** - Users interested in learning to write and modify Needles reports are encouraged to:

1. Review the 60+ standard reports contained in your Needles database.
2. Study the "Needles for Smarties" Report Writing Manual.
3. Attend an upcoming "Knowledge is Power" User-Defined Report Writing Seminars.
4. Schedule Needles Report Writing Training.
5. Hire a Certified Needles Report Writer to create reports for you.

**[Needles Document Coding Training/Service](#)** – After speaking to a number of our clients, we realized that some firms were not merging documents because the necessary documents hadn't been coded! Conversely, we also learned that, in some instances, documents were coded when the system was first implemented, but had not been updated. To remedy this problem, Needles Coding Specialist Jill Howard, (a licensed attorney and Certified Needles Trainer with over 8 years of experience), will teach your staff to code documents [OR code the documents for you](#) using the WebEx training system!!

**[Needles & QuickBooks Interface Training](#)** - With the release of version 4.65, Needles began to include a bi-directional interface with Intuit's QuickBooks accounting software program. Prior to installing the new integration, Needles recommend, that all users examine the available documentation. However, since documentation cannot replace the advice of a trained professional, we are happy to announce that Accounting Specialist Nicole Hanley, (a Needles user since 2001 and former Legal Administrator with extensive QuickBooks and Law Office Bookkeeping experience), is now available to help your firm master the intricacies of the new interface.

For more information regarding any of the new Needles services, please contact Michael Snyder at (410)-363-1976 or via e-mail at [msnyder@needles.com](mailto:msnyder@needles.com).

## Gold Star Clients

Congratulations to each member of the Needles Gold Star Club!

### 1,000 - 5,000 Cases

Audette, Bazar, Cordeiro & Grasso Inc.  
Bernstein & Bernstein  
Campbell & Associates  
Cordisco, Bradway & Simmons  
Don Bumgardner Law Offices  
Friedman, Domiano & Smith  
Gold, Khourey & Turak  
Gray Robinson  
Jay Trucks & Associates, P.C.  
Kimmel, Carter, Roman & Peltz, P.A.  
Lee M. Herman, Esquire PC  
Mark C. Tanenbaum Law Offices  
Miraldi & Barrett Co., L.P.A.  
Omer & Associates  
Peter N. Davis & Associates  
Regan Zambri & Long, PLLC  
Rothchild Law Office  
The Law Offices of Melvin D. Marx, P.A.  
Walter Clark Legal Group

Azar & Loncar  
Bourgault & Harding Law Offices  
Cochran Law Office  
Dallas W. Hartman, P.C.  
Eden & Rafferty  
Gelman, Gelman, Wiskow & McCarthy LLC  
Goldman & Associates  
Hendricks Law Office  
Joel Skirble & Associates  
Krafchick Law Firm  
Malott Law Offices  
Martin, Harding & Mazzotti  
Mithoff Law Firm  
Overton Law Offices  
Plaxen & Adler, P.A.  
Reyes & Associates, P.C.  
Shuttleworth, Ruloff, Swain, Haddad & Morecock PC  
Truman Law Office  
Wunderlich & Associates

Begelman & Orlow  
Brecke Law Firm  
Cohen & Feeley  
Dept. of Environmental Protection  
Epstein, Lipsey & Clifford, P.C.  
Gittleman, Paskel, Tashman & Walker  
Gordon & Gordon  
Huffman & Huffman  
Juman & Juman  
Law Offices of Gary C. Johnson  
Mammuth & Rosenberg  
McGuffey Law Office  
O'Connor, O'Connor, Breese & First  
Palumbo & Associates, LLC  
Reardon Law Firm  
Robbins & Associates PC  
Ted A. Greve & Associates, P.A.  
Wallach & Wolff LLC

### 5,000 - 10,000 Cases

Barkan Neff Handleman Meizli  
Chasen & Boscolo  
E. Stewart Jones Law Offices  
Gary Eubanks & Associates  
Henson & Fuerst, P.A.  
Jones Martin Parris & Tessener  
Lee B. Steinberg, P.C.  
Lovett Scheffrin Harnett  
Mellon, Webster & Shelly  
Ready Law Firm  
Waukesha County Corporation Counsel

Berg Injury Lawyers  
David Allen & Associates  
Feinstein & Affiliates, P.C.  
Harris Law Firm  
Hurst, Brumback & Brusic, PLLC  
Joye Law Firm  
LeViness, Tolzman & Hamilton, P.A.  
Luvera & Associates  
Munley, Munley & Cartwright  
Rubin & Licatesi

Buckland & Schumm  
DeAngelis, Dastur & Associates, P.C.  
Flager & Yockey  
Harvey L. Walner & Associates, Ltd.  
Javerbaum, Wurgaft, Hicks & Zarin  
Leanza & Agrapidis  
Lewis & Daggett, P.A.  
Malagon, Moore & Jensen  
Rainer & Rainer  
Villari, Brandes & Kline, PC

### Over 10,000 Cases

Ben Abbott Law Office  
Dyer, Garofalo, Mann & Schultz  
Gamma Law Associates, Inc.  
Marcus Law Office  
Norris Injury Lawyers, P.C.  
Stark & Stark

Brown, Brown & Young  
E. S. Gallon & Associates  
Ginarte, O'Dwyer et al  
Martin, Banks, Pond, Lehocky & Wilson  
Nunn Law Office  
Stein, Sperling, Bennett, De Jong et al

Crumley & Associates, PC  
Eshelman Marketing and Management  
Kasdorf, Lewis & Swietlik  
Nesci, Keane, Piekarski, Keogh & Corrigan  
R. Steve Bowden & Associates  
Woods & Woods

The Gold Star Club is composed of clients that have entered a landmark number of cases into their Needles system. If your firm has reached a landmark number of cases, but is not listed, let us know!

## Train the Trainer 2007

Each May the Certified Needles Trainers assemble in the Baltimore Training Facility to begin their recertification classes. These courses educate the group on the newest Needles features, new uses for existing features and upcoming program changes and version releases. Even more important, is the opportunity for the trainers to discuss amongst themselves new ways to help firms successfully implement and expand their use of Needles in order to improve firm efficiency, organization and profitability.

Needles Administrative Director, Michael Snyder feels that the event is highly important since "it ensures that the trainers have not only received the most updated information, but that they understand and are able to teach someone to do the very tasks that they were trained on."

This year's course schedule placed special emphasis on the upcoming bidirectional Microsoft Outlook integration, the new QuickBooks SDK interface, revamped Clean Sweep process, website Online Hotline, Report Writing request changes, and the features slated for inclusion in upcoming releases.



The Needles Certified Trainers

Back row (from left): Lonnie Wright, Sherryl Coleman, Liz Teixeira, Barbara Bull, Maggie Myatt, Christine Cole; Front row: Ann May, Robert Duffney, Robin Smith, Gwen Smoot, Joy Descutner, Randy Chase (Not pictured: Cathy Mackie, Jill Howard & Nicole Hanley)