



## 2007 First Quarter Client Seminars

To register: Visit the events portion of our website, [www.needles.com](http://www.needles.com) or call (410)-363-1976.

January 18-19: Basic User-Defined Report Writing: Getting the Most Out of the Needles Report Writer

January 29-30: Needles & QuickBooks: Setting up and Using the New Interface

March: 5-6: Document Coding & Merging Workshop for Microsoft Word Users

March 7-8: Basic User-Defined Report Writing: Getting the Most Out of the Needles Report Writer

March 26-27: Needles Basics & Beyond: A Foundation of Basic Program Features and Benefits

April 11-12: Needles & QuickBooks: Setting up and Using the New Interface

April 19-20: Needles Basics & Beyond: A Foundation of Basic Program Features and Benefits

April 26-27: Document Coding & Merging Workshop for Corel WordPerfect Users



# Sidebar

Winter 2006; Volume 19, Number 4



*Happy Holidays from our family to yours!*

Dear Friends:



## President's Letter

You will probably not be surprised to learn that many of our clients have been using PINS and/or Needles to manage their cases for the past 15 – 20 years. Imagine the amount of data that accumulates over that period of time! At Needles, we realize that during the course of normal business and over time, some firm's databases have possibly become corrupt. This is NOT to imply that a structural issue exists. Rather, the firm's data is "corrupt" in the sense that it is often fragmented, duplicated, or useless since the firm no longer operates the way it once did. Often, as a firm develops and begins using new features, its use of the program changes and matures. Again, this is not a dig at the Needles program nor a surprise. Rather, it is an honest evaluation of growth. Realizing that this is a way of life for many, I would like to recommend that we repair this fragmentation and "clean up" your database for you sooner rather than later.

In order to complete this process, I would like to introduce you to the **Needles Clean Sweep** process! We like to compare this process to the process of cleaning your house. When you first move in to a new home, everything is clean, uncluttered and where it is supposed to be. Over time, as your family grows and changes, your house can become cluttered with old junk. Closets get overstuffed, rooms change reasons for use, and the floors get dirty. You would never think to move into a home, let 15 years go by, and never clean or rearrange! The Clean Sweep process works in the same way. Your Needles system is where you "live" each and every day. Over time, it accumulates junk, your needs change, and your system should change to accommodate that. While this process will not return your database to its original condition, I guarantee that it will create a more customized and functional system designed around the way your firm practices **today**.

When deciding whether your firm should complete a Needles Clean Sweep, be sure to consider the following areas of your Needles system:

1. Providers – do you have duplicates? Is all the information entered properly?
2. Are you taking advantage of user-defined tabs, or are workarounds causing you to put data where it may not make sense?
3. Do you have fields that are no longer appropriate that have been left over from your days of using PINS?
4. Is your checklist too long? Do all the items make sense and occur in the proper order?
5. When you do a names search, do you get blank names, or no names at all?
6. Are you having difficulty running standard or user-defined Needles reports due to the fact that the fields required for proper reporting are either inappropriately created or non-existent?

*President's Letter (cont'd...)*

January 10-13: M & L Legal Management Show in Cabo, Mexico

January 29-31: Legal Tech New York in New York, NY

February 10-13: ATLA 2007 Winter Convention in Miami, FL

February 19-20: Nevada Workers Compensation – Top 10 Medical/Legal Issues in Las Vegas, NV

March 1-2: Network Affiliates Meeting in Las Vegas, NV

March 22-24: ABA Tech Show in Chicago, IL

April 12-15: VA Trial Lawyers Annual Convention in White Sulphur Springs, WV

April 26-27: ATLA New Jersey Boardwalk Seminar in Atlantic City, NJ

July 14-18: ATLA Annual Convention in Chicago, IL

August 1-4: NACDL Annual Meeting in San Francisco, CA

August 9-14: ABA Annual Meeting in San Francisco, CA

October 10-14: DRI Annual Meeting in Washington, DC

In many cases, these and other areas are where the fragmentation/duplication exists. By completing a Needles Clean Sweep, your firm will improve these trouble areas and advance to the next level of case management.

At Needles, we have developed a form to help you evaluate your Needles system more thoroughly. To complete it, simply check off the areas that you would like to discuss and note any areas where you have specific concerns. Shortly after we receive the completed form, a Certified Needles Trainer will contact you to discuss your database and the Clean Sweep process in greater detail. During this conversation, your trainer will also work with you to create a training schedule that will allow your firm to complete the cleansing process and give you an approximation of the time and cost involved.

I strongly urge you to consider "Clean Sweeping" your entire Needles database. After all, this is your lifeline to a continuing and efficiently run law firm. Why not take the steps necessary to ensure that your firm's engine continues to run properly?

As always, feel free to contact us if you have any questions regarding Clean Sweep or Needles in general. We are who we are because of your continued success and I encourage you to continue working with us to help you get the very maximum out of your Needles system.

Burton L. Bank  
President  
Needles Case Management System

*Needles Version 4.65.x*

To our valued clients: We work very hard to provide you with the latest and greatest in Case Management Software. Our programmers spend a great deal of time turning your wishlist items into reality. As with any software program, there are occasional "bugs" or, as we like to call them, "undocumented features," that crop up as new versions are programmed. We spend time and effort alpha and beta testing our program so that the fewest number of these "undocumented features" reach your office. Unfortunately, there are times when, despite all our testing, these items reach client offices. Because of that, we release Needles patches immediately to solve these problems. We apologize for any inconvenience this may cause at your office, but please know that your stable and uninterrupted software experience is always our goal. Thank you for your time and continued support.

*Knowledge is Power*

At Needles, we've learned that successful system implementation and case management protocol revision are dependant upon a number of factors. However, none is more important than the support and active involvement of the firm's management team. By consistently embracing new features and encouraging proper training and system use, this group lays the foundation for Needles success.

In firms both large and small, we've noticed that the program's effectiveness is directly impacted by the management team since this group is responsible for scheduling regular Needles training and system maintenance, working with the firm's hardware support team to complete system upgrades and setting an example of exemplary system use to encourage and motivate staff members. Additionally, this group is often responsible for submitting items to the Needles Wishlist and providing one-on-one support for struggling staff members. In the spirit of the holiday season, we at Needles would like to congratulate and applaud those attorneys and Needles Managers who go the extra mile. Please know that your hard work is greatly appreciated.

## Needles Delivers

To be a Needles Power User, your firm must be able to retrieve the information stored in the program's database in a concise and useable format. Needles' reports and merge documents allow users to accomplish this task in a timely manner. While certain reports are standard and may be used in any firm, in order to be effective, merge documents must be created on an individual firm basis.

After speaking to a number of our clients, we realized that some firms were not merging documents because the necessary documents were never coded! Conversely, we also learned that, in some instances, documents were coded when the system was first implemented, but had not been updated. Upon deeper evaluation, we learned that these situations exist for one of two reasons:

1. either there wasn't anyone on staff that had received proper Merge Coding training or
2. trained staff members were overwhelmed and simply unable to devote time to the task.

In order to combat this problem, we would like to introduce you to Needles Coding Specialist and Certified Needles Trainer, Jill Howard. Based in Winston-Salem, NC, Ms. Howard has worked as a Needles trainer for over 8 years and is also a licensed attorney.

Using the Needles WebEx training system, Ms. Howard will teach your staff to code any number of documents.

-OR.-

If you prefer, she will code these documents for you!!

For more information regarding Needles Document Coding training or the Document Coding Service, please contact Michael Snyder at (410)-363-1976 or via e-mail at [msnyder@needles.com](mailto:msnyder@needles.com).

## We're Here for You!!!

At Needles our mission is to: "provide the best Case Management Software, training and support to the legal profession on a client by client basis." Thus, we encourage you to contact our office if you or any member of your staff ever has any questions or comments concerning the use or improvement of Needles. Please note: Our office is open Monday - Friday from 8:30 a.m. - 5:15 p.m. E.T.



## New Faces!

Mike Lichtenfels joins the Needles team as a Conversion Specialist. A native of Elkton, MD, he received a B.S. in Information Systems Management from the University of Maryland at College Park. Prior to joining the Needles team, Mike worked in the conversion field as a Data Transformation Specialist. This happily married man is a loving father to son Corey and daughters Brittney, Maisie and Ashley. As a family, the Lichtenfels enjoy feeding Corey's Ball Python, watching movies, and dining out. In his free time, Mike likes to watch his daughters cheer for their Junior Football teams, watch football (Go Steelers!!), and work out. When relaxing, he prefers to sit on his deck with his wife and smoke "a hand-rolled premium cigar." Mike tries to keep a positive outlook on any situation and feels that "any day above ground is a good day."



Rose Marshall-Anderson joins the Needles team as a Technical Support Specialist. A native of Prince Georges County, she and her husband now live in Parkville, MD with their three children, Edmund, Miles and Emma. Previously, Rose worked as a Senior Helpdesk Technician and supported multiple client/server applications. An avid hiker, she enjoys traversing the area's beautiful parks and trails. In her spare time, Rose also likes to read non-fiction books and, at her husband's urging, has recently begun following football statistics. (Go Redskins!!!)



Robin Smith joins the Needles team as a Certified Needles Trainer. A native of Glen Burnie, MD., she graduated from Anne Arundel Community College with a degree in Paralegal Studies. Robin has worked in the legal field for over 20 years and has gained an understanding of many areas of law including Personal Injury, Domestic, Corporate and Immigration. Of those 20 years, 13 were spent as a legal assistant at Baltimore law firm, Gordon, Feinblatt, Rothman et. al. While at this firm, Robin spent 8 years working as a Needles user in the firm's Personal Injury department. Such an extensive legal background has prepared her for the varied tasks of working with the Needles Support Team. In her spare time, Robin enjoys cooking, dancing and relaxing with her friends and family. This mother of three and grandmother of five, has been happily married for 29 years.



Gwen Smoot joins the Needles family as a Training Support Specialist. A native of Fort Worth, TX., she graduated from the University of North Texas with a degree in Business Administration - Administrative Management. Gwen has worked in the legal field since 1984 and explored the areas of Civil Litigation, Real Estate, Family, Oil & Gas, Mass Tort and Corporate Law. For 6 years she was even the Needles Manager for a Plaintiff - Asbestos law firm in Texas. Her hobbies include listening to jazz and gospel music, traveling, gourmet cooking, interior decorating, completing Sudoku puzzles, event planning and Skin Care consulting. She is also a Dallas Mavericks fan and, (even after the 2006 N.B.A. play-offs), her favorite quote is "Go Mavs, STILL!!!" Gwen has lived in the Southern California area, and her favorite travel destinations include Hawaii and Japan. Gwen has been happily married for 28 years to a retired Naval Chief Petty Officer. She also has one son who is a Culinary Arts graduate and professional chef.