SUCCESS STORY

How Lester Schwab Katz & Dwyer Uses SurePoint's Solutions to Operate Leaner, Faster, and Smarter

In an insurance defense market defined by rate pressure and rising operational complexity, Lester Schwab Katz & Dwyer (LSK&D) recognized that firm performance depends on more than strong legal talent, it requires real-time financial insight. By partnering with SurePoint and adopting the SurePoint Finance Enterprise platform, the firm modernized its finance operations and unlocked the clarity needed to run a leaner, smarter, and more resilient business.

Driving Firm Performance at LSK&D

With 42 attorneys supporting demanding carrier clients, LSK&D operates in an environment where efficiency is not optional, it is mission critical. Leadership understands that profitability hinges on disciplined time capture, controlled billing processes, and the ability to make informed decisions quickly.

For Director of Finance, David Glicksman, driving firm performance means having complete confidence in the data behind every decision—from staffing and utilization to overhead and client profitability, stating, "SurePoint does far more than just help us bill. It gives us the information we need to run the business more efficiently."

Lester Schwab Katz & Dwyer At-a- Glance

- **Practice Focus:** Insurance Defense
- **Attorneys:** 42
- **Offices:** New York City (single office)
- **Workforce Model:** Largely remote

The Challenge: Replacing Legacy Systems to Unlock Efficiency

Before SurePoint, LSK&D's finance ecosystem was fragmented and increasingly unsustainable. The firm relied on an on-premises financial platform that was being sunset, an obsolete third-party entry system, and a costly eBilling add-on that delivered limited value.

Key Challenges Included:

- Disconnected systems requiring manual reconciliation
- Risk of lost or incorrect time due to lack of integration
- A billing workflow that forced invoices to be posted before review
- Heavy dependence on Excel for reporting and financial statements
- Higher staffing levels required to manage increasingly manual and complex workflows

These inefficiencies were further amplified as the firm transitioned to a largely remote workforce post-2020, making cloud accessibility a necessity rather than a "nice to have."

Elevating LSK&D's Tech Stack with SurePoint

LSK&D selected SurePoint Finance Enterprise not simply as a replacement for legacy systems, but as a strategic platform to simplify, consolidate, and modernize how the firm operates. The firm needed a solution that could support a remote workforce while eliminating system sprawl, reducing operational complexity, and ensuring data integrity across time entry, billing, and financial reporting.

SurePoint distinguished itself by delivering a fully cloud-based environment that centralized critical financial workflows into a single source of truth. Equally important was SurePoint's ability to streamline billing and time entry into a single, integrated platform.

Several Factors Reinforced the Firm's Decision:

- A true cloud architecture that supports remote work and secure access from anywhere
- A flexible monthly pricing model with no large upfront conversion fee, aligning with the firm's cost-sensitive operating environment
- A strong community of peer firms in the New York legal market, providing confidence through proven adoption and shared best practices

Proven Results with SurePoint

- $50,000 annual savings from third-party eBilling consolidation
- ~2 days saved per month in billing and close cycles
- 2–3 fewer finance staff required
- Faster time entry, billing, and reporting

Simplified Time Entry That Improves Accuracy

By eliminating the third-party time entry system, LSK&D removed a major source of friction for attorneys. Finance Enterprise allowed the firm to streamline time entry requirements, eliminating obsolete codes that no longer served client or billing needs. Glicksman notes, "We were forcing attorneys to enter codes that weren't meaningful anymore. SurePoint let us simplify time entry to what actually matters."

Impact:

- Faster and more accurate time capture
- Reduced administrative burden on attorneys
- Less risk of lost or unreconciled time

A Smarter, More Controlled Billing Process

SurePoint's pre-bill workflow fundamentally changed how LSK&D manages billing. Bills are now reviewed, edited, and validated before posting, dramatically reducing rework and errors.

Additional Billing Improvements Include:

- Built-in LEDES eBilling that fully replaced an expensive add-on
- Direct PDF invoice generation with firm branding
- Elimination of printing, scanning, and manual distribution

Impact: $50,000 in annual cost savings from eliminating third-party eBilling tools

"Today, we are running a far more sophisticated and efficient operation—one that delivers greater value to the firm—while operating with 2–3 fewer people than we previously required."

— Director of Finance, David Glicksman

Faster Close Cycles, Greater Flexibility

With SurePoint Finance Enterprise, billing no longer blocks month-end close. LSK&D can now run pre-bills before the month is closed, saving two full days a month.

Impact:

- Bills go out faster
- Financials are completed sooner
- Improved responsiveness to leadership and partners

Firm-wide Visibility That Drives Better Decisions

Perhaps the most transformational impact of SurePoint has been visibility. Finance Enterprise gives real-time access to financial statements, utilization metrics, profitability data, and operational reports without rebuilding them manually in Excel. According to Glicksman, "The benefit of visibility is immense. I now have more knowledge and understanding of our financial data."

This insight directly supports smarter decisions across the firm:

- Identifying under- and over-utilized attorneys
- Evaluating practice-level and matter-level profitability
- Reallocating resources to improve margins

Rather than relying on instincts or delayed reports, leadership now has data-backed clarity to guide staffing, client strategy, and overhead planning.

Driving Firmwide Value Across Roles

- **Managing Partners:** Trusted financial insight into profitability, utilization, and overhead to drive confident growth and strategic decisions.
- **Attorneys & Practice Leaders:** Real-time visibility into time, matters, and billing to align work with client expectations and compliance.
- **Operations:** Streamlined, low-risk workflows that improve coordination across distributed teams with fewer manual steps.
- **Accounting & Finance:** Faster billing and close, Excel-ready reporting, and the ability to support the firm with significantly leaner staffing.

Accounting & Finance

- Faster billing and close cycles
- Native reporting and Excel-ready data
- Ability to support the firm with 2–3 fewer staff than previously required

A True Strategic Partner

For LSK&D, SurePoint is not just a technology provider. It is a strategic partner that enables smarter, faster, and more confident decision-making.

> “Everything I do runs through Finance Enterprise. SurePoint made me better, smarter, faster and able to bring real data to leadership conversations.”

— Director of Finance, David Glicksman

By replacing fragmented legacy tools with a unified, cloud-based finance platform, SurePoint empowers LSK&D to operate lean, stay competitive, and continue driving firm performance in a demanding legal market.

About SurePoint® Technologies

SurePoint Technologies drives Firm Performance by helping mid-sized law firms operate efficiently, compete effectively, and grow with confidence. Powered by a connected legal technology ecosystem with embedded intelligence, our configurable Practice, Finance, and Growth Solutions streamline operations—from timekeeping, billing, and payments to CRM, talent insights, and business intelligence.

By simplifying operations, strengthening financial performance, and supporting sustainable growth, SurePoint unifies the business and practice of law and empowers legal professionals to focus on what matters most: serving clients, leading teams, and creating lasting impact.

Learn more about SurePoint Finance Enterprise & Legal Insights:

surepoint.com