SUCCESS STORY

How Thompson Brody & Kaplan Uses SurePoint Pro to Streamline Operations, Accelerate Case Progress, and Create Capacity for Growth

For contingency-based law firms, efficiency directly impacts outcomes. The faster matters move forward, the faster attorneys can deliver results for clients and drive firm performance. For Chicago-based Thompson Brody & Kaplan, LLP, improving efficiency meant finding a better way to manage matters, documents, workflows, and financial processes that had long been handled through a combination of spreadsheets, email, local file storage, and disconnected systems.

Drawing on SurePoint's modern practice and financial management platform, SurePoint Pro, the firm transformed key operational processes, creating greater visibility, consistency, and accountability across the organization. Today, attorneys and staff spend less time managing administrative work and more time focusing on clients and case progression.



Thompson Brody & Kaplan At-a-Glance

- **Practice Focus**: Commercial and personal line property subrogation, catastrophic loss, product liability and complex, multi-party litigation.
- **Attorneys**: 8
- **Office:** Chicago, IL
- **Solutions in Use:** SurePoint Pro

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SUCCESS STORY

Driving Firm Performance Through Efficiency and Visibility

For Thompson Brody & Kaplan, firm performance is measured by more than productivity metrics. Success depends on maintaining momentum across hundreds of active matters, ensuring clients receive timely updates, and creating workflows that allow attorneys to focus on advancing cases rather than managing administrative tasks.

As a plaintiff firm managing a high volume of contingency matters, delays create risk. The firm needed a more systematic approach to matter management—one that would improve visibility, eliminate manual processes, and help ensure no task or follow-up slipped through the cracks.

"Time is money in our world. Being able to complete tasks more quickly is a huge benefit."

— Bradley Hamblock, Senior Associate

Before implementing SurePoint Pro, opening a new matter required multiple steps, approvals, emails, spreadsheets, and manual data entry. Information was scattered across systems, making it difficult to track progress, monitor tasks, and quickly locate critical matter details.

The Challenge: Fragmented Processes, Limited Visibility, & Administrative Burden

Prior to adopting SurePoint Pro, Thompson Brody & Kaplan had never deployed a formal case management system. Instead, the firm relied on a collection of manual processes that required significant coordination among attorneys, administrators, and finance personnel.

What is SurePoint Pro?

A legal practice and financial management platform purpose-built for law firms. The result is a unified system that aligns front-office attorney workflows with back-office financial operations.

Matter intake was particularly cumbersome. Attorneys would complete paper forms or spreadsheets that were routed through multiple stakeholders for conflict checks, approvals, and billing setup before a matter could officially be opened. The process generated numerous emails and required the same information to be entered repeatedly across systems.

Key Challenges Included:

- Manual matter intake and file-opening procedures
- Limited visibility into task ownership and matter status
- Spreadsheet-based tracking and follow-up processes
- Duplicate data entry across operational and financial systems
- Difficulty maintaining consistent client update schedules
- Document storage on local servers
- Time-consuming searches across multiple sources for information

For attorneys managing hundreds of active cases, even routine follow-ups presented obstacles. Without automated reminders or standardized workflows, matters could sit untouched for extended periods, creating inefficiencies and increasing the risk of delayed client communication.

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Transforming Workflows with SurePoint Pro

Thompson Brody & Kaplan selected SurePoint Pro because of its flexibility and ability to adapt to the firm's existing processes rather than forcing attorneys and staff to adopt rigid workflows. The team wanted a solution that could be configured around how they already worked while providing opportunities for greater automation and operational consistency.

One of the first areas to see significant impact was matter intake. By leveraging workflow automation, task blueprints, and automated file-opening processes, the firm eliminated repetitive handoffs and reduced administrative effort. Information is now entered once and automatically routed through the appropriate approval and setup processes.

> **"We weren't forced to change how we work. We could mold the system to our workflows"**
>
> **—Bradley Hamblock, Senior Associate**

Document blueprints and task blueprints have also become central to daily operations. Repeatable matter activities can be automatically generated, enabling attorneys to launch established workflows in seconds rather than manually creating tasks one at a time.

The firm additionally uses SurePoint Pro to:

- Automate matter intake workflows
- Standardize task management and follow-up processes
- Generate documents through configurable templates
- Streamline LEDES billing workflows
- Centralize matter information and reporting
- Integrate with SharePoint for document management
- Integrate with QuickBooks for financial operations

Proven Results with SurePoint Pro

- 2–3 hours saved on the matter-opening process for each new matter
- LEDES billing reduced from 15–20 minutes to approximately 5 minutes
- Elimination of duplicate data entry across systems
- Improved visibility into matter status and task ownership
- Faster access to documents and case information
- More proactive client communication and follow-up management
- Greater operational consistency through automation

Impact: Faster Workflows, Better Client Service, and Greater Capacity

The benefits of SurePoint Pro extend well beyond operational efficiency. By centralizing information and automating routine processes, the firm has established a more disciplined and systematic approach to matter management.

Task reminders and blueprint-driven workflows help ensure that matters continue progressing, while proactive notifications support timely client communication. Rather than waiting for clients to request updates, attorneys can stay ahead of expectations with scheduled outreach and follow-up activities.

Firm leadership also benefits from increased visibility. Attorneys and partners can quickly review matter status, identify who is responsible for specific tasks, and monitor progress without relying on status meetings or email chains.

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For the finance team, SurePoint Pro has simplified billing and reporting processes. LEDES billing workflows have become significantly faster and more accurate, while integrations help eliminate duplicate entry and improve confidence in financial data.

The SharePoint integration has proven especially valuable by giving users direct access to documents from within SurePoint Pro, eliminating the need to navigate multiple folders or systems to locate information. At the same time, the QuickBooks integration improves reporting capabilities and reduces administrative effort associated with financial management

Creating Time for Strategic Growth

One of the most meaningful outcomes for Thompson Brody & Kaplan has been the ability to redirect time toward higher-value initiatives. As administrative burdens have decreased, team members have gained capacity to focus on professional development, process optimization, and staff training.

Looking ahead, the firm plans to further expand its use of automation through role-based workflows, advanced task assignment capabilities, and additional process enhancements. Leadership sees significant opportunity to continue driving efficiency gains as adoption deepens across the organization.

Looking Ahead: Building on a Strong Foundation

Less than a year after implementation, SurePoint Pro has helped Thompson Brody & Kaplan transition from manual, disconnected processes to a centralized operational framework that supports efficiency, accountability, and growth. By streamlining matter management, improving access to information, automating workflows, and integrating critical business systems, the firm has created a foundation for continued operational maturity.

As the firm expands its use of automation and workflow capabilities, SurePoint Pro will continue to serve as a strategic platform for helping Thompson Brody & Kaplan deliver exceptional client service, accelerate case progression, and support long-term growth.

Driving Value Across the Firm

- Attorneys gain visibility into matter status, tasks, and follow-ups while reducing administrative effort
- Partners and firm leadership benefit from greater oversight and operational transparency
- Finance and operations teams streamline billing, reporting, and information management
- Staff and legal support personnel work more efficiently through standardized workflows and automation
- Clients receive more consistent communication and a more proactive service experience

Learn more about SurePoint Pro

surepoint.com

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

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