



CaseLink<sup>2</sup>

## Trustee Returns to BMS, Discovers “Best of All Worlds”

After switching back to BMS from another software provider, New Jersey-based Trustee Christine Shubert says she has the “best of all worlds”—productivity-enhancing *CaseLink*<sup>2</sup> and exceptional, personalized support.

### Reconsidering Switch to Other Vendor

Ms. Shubert had been a long-time BMS client. Ever since she went on panel in 1986, she had used BMS software, developing strong relationships with BMS team members along the way.

Despite being a satisfied BMS client, Ms. Shubert wanted to gain more flexibility in her practice, so she decided to switch over to a web-based platform offered by another provider.

After switching, Ms. Shubert missed the high-quality support and service she had been accustomed to with BMS. So, when she learned that BMS now offered a robust cloud-based case administration solution, she switched back. She was not disappointed.

“I had known all the folks from BMS for many years, and I still had those relationships [when I switched back],” Ms. Shubert said. “And *CaseLink*<sup>2</sup> is a great product. I’m happy that I’m back.”

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### Saving Time & Money, plus Better Workflows in CaseLink<sup>2</sup>

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Now that Ms. Shubert is using *CaseLink*<sup>2</sup>, she appreciates that the program is like *CaseLink Office*, which she had known well, but is even more intuitive and easy-to-use.

“It’s more user-friendly, which for people like me is really important—I’m not a new trustee,” Ms. Shubert said. “I don’t want to work really hard to learn new programs, and it has been very easy with *CaseLink*<sup>2</sup>.”

Since switching, Ms. Shubert loves the software’s timesaving features that keep her on track.

“The Alerts Panel on the Home Screen really helps me manage my deadlines—it tells me when those dates are coming up and keeps me on top of what I need to do,” Ms. Shubert says.

And she is especially thankful for the money she has saved not needing to hire staff to accomplish tasks the software does for her—which she had to do when she was using her other vendor’s software.

“[With my other vendor] I would have to pay someone to keep track of these things for me,” Ms. Shubert says. “It was definitely more trouble keeping track of everything before.”

With the time and money she has saved, Ms. Shubert appreciates how the software has helped to streamline her 341(a) meetings.

“My 341(a) meetings are much easier,” Ms. Shubert says. “I log on live at the meeting, and I move between cases so quickly in *CaseLink*<sup>2</sup>. At the end of my day, I can file my results right then and there. It makes the day flow better.”

### “Best of All Worlds” Support

With BMS, Ms. Shubert says she has the “best of all worlds”—software that makes her job easier and consistently excellent support.

“My Account Manager Martin Carey is always there to help me,” Ms. Shubert said. “If I run into a problem, I never panic—because I know Marty will help me through it.”

“If I want, though, I can open a Chat window in my software to instantly speak to someone in the Support Center,” Ms. Shubert added. “So I really have the best of all worlds—I can use Chat, the Support line, or contact Marty if I ever need help.”

A completely satisfied BMS client, Ms. Shubert wants other trustees to know why as well.

“I’ve recommended *CaseLink*<sup>2</sup> to colleagues on my panel, attendees at the last NABT, BMS clients still on *Office*, and trustees still with other vendors,” Ms. Shubert says. “I always tell them, ‘Take a look at BMS. They make my life easier and I’m sure they’ll do that for you too.’”

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