



CaseLink²

Colorado Trustee Says it's a "No-Brainer" to Switch to CaseLink² by BMS

Chapter 7 Trustee David Wadsworth from Denver, CO, felt stagnated by his former vendor's slow software and support. After switching to BMS, Mr. Wadsworth's practice is speeding up with *CaseLink²* and excellent service.

Moving "at a Snail's Pace"

Since being appointed to the panel in 2009, Mr. Wadsworth had used his former vendor's desktop-based software. But when his then-vendor debuted their web-based platform, he was persuaded to switch—only to find a sluggish system and decreased productivity as a result.

"[The software] was so slow that it literally doubled and tripled the time for my staff and I to do simple tasks," Mr. Wadsworth said. "Every time I clicked a button, it took 30 seconds or more before the next screen appeared. It was just painfully, painfully slow."

Frustrated, Mr. Wadsworth reached out to his then-vendor for guidance. But he got no encouragement.

"When I told them that I wanted to go back to the desktop product, they said I couldn't do that," Mr. Wadsworth said. "So I decided to find another vendor."

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On the lookout for another provider, Mr. Wadsworth was referred to BMS by colleagues in the area. After seeing the *CaseLink* software, he decided to make the move.

With his practice firmly back on track with BMS, Mr. Wadsworth was interested in looking at options to be able to have his staff work remotely. So, he took a demo of the *CaseLink²* software from BMS in early 2017.

Impressed with its lightning speed, and assured by his Account Manager he would not regret moving, he decided to upgrade.

Full Steam Ahead

After upgrading to *CaseLink²*, Mr. Wadsworth has found the software to be incredibly fast and straightforward—contrary to his former vendor's web-based platform.

“CaseLink² has made a huge difference in our daily output because it’s so easy to use from anywhere. That has helped my office tremendously, without a doubt.”

“Unlike [my former vendor’s] web product that moved at a snail’s pace, there is no noticeable delay with *CaseLink²*, so that is great,” Mr. Wadsworth said. “And, it’s so easy to use because it’s laid out so everything is very accessible. Overall, it’s really user-friendly.”

In addition to enhanced speed, Mr. Wadsworth’s productivity has increased due to the system’s workflow-enhancing features, including the streamlined 341(a) View.

“Prepping for 341(a) meetings is much better in *CaseLink²*,” Mr. Wadsworth said. “I never have any problems accessing my case

information because the program is so fast. It’s so much easier to keep everything updated and in one place for my meetings.”

One-of-a-kind features such as the Alerts Panel and the Sidekick also help to keep his tasks full steam ahead.

“I check the home page alerts every morning,” Mr. Wadsworth said. “It’s great to see at-a-glance the primary tasks I need to get done each day as soon as I log into the software. Plus, the Sidekick makes it super easy to access my forms, documents, and everything else!”

Above all, the software’s mobility has most enhanced Mr. Wadsworth’s practice—allowing his staff to access the software anytime, anywhere.

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From “0 to 60”, with Sterling Support

Since switching to BMS, Mr. Wadsworth is in his stride with the robust software and excellent customer service from his Account Manager, Tanya Olson, and the BMS Support Center.

“At BMS, the service is top-notch,” Mr. Wadsworth said. “Everyone is superb at answering questions, and they’re quick.”

“I liked the folks with [my previous vendor], but I think the BMS folks are better,” he added. “They have a better sense of what they’re doing, they’re super responsive, and they are a pleasure to work with.”

For those not yet using *CaseLink²*, Mr. Wadsworth says it’s a “no-brainer” to switch.

“Don’t be afraid of it,” Mr. Wadsworth said. “There’s really nothing negative about it. It’s fast, easy-to-use remotely, and it works very well. Plus, the service is really great. For me, it’s a no-brainer.”

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