



CaseLink²

Maine Trustee Switches from Other Vendor's Software to Discover More Efficient & Effective Practice with CaseLink² by BMS

Trustee Nathaniel Hull in Maine is a tech-savvy Chapter 7 professional who independently administers his cases. After struggling with another vendor's inefficient software platform, Mr. Hull is sailing smoothly with *CaseLink²*.

Lighter Load with Automated Tasks

When Mr. Hull went on panel in 2014, he felt a web-based solution was most fitted to his practice.

"My life and my business are online," Mr. Hull said. "It makes sense to have my cases on the web so I can access them from the office, my house, and my 341(a) meeting locations."

However, after selecting another vendor's "web-based" platform, Mr. Hull soon found that the software was unsuited to his hands-on work style.

"I was not happy with it because it was so clunky – there was no automation," Mr. Hull says. "I do everything for my practice, so the time I had to spend on manual tasks created no value for me or my estates."

When Mr. Hull found *CaseLink Web* by BMS, he signed up "almost immediately" after seeing its automated features.

"CaseLink² saves me a huge amount of time each day. It automates processes I don't need to pay attention to. And, the things I do need to touch, I can make the lightest touch possible and get things done in half the time as with my previous provider."

"I do everything for my practice, so the time I had to spend on manual tasks [in my previous provider's platform] created no value for me or my estates."

"*CaseLink Web* was much, much better than my other vendor's cloud platform," Mr. Hull said. "BMS freed up a huge chunk of my time by taking care of so many things for me. And I only need an Internet browser to access my cases from anywhere."

When Mr. Hull saw a demo of *CaseLink²* in September 2016, the new time-saving features of the software impressed him greatly. So, he said "yes" to the upgraded platform.

Effortless Audits, 341(a) Meetings & More

Now that Mr. Hull is using *CaseLink²*, he has seen significant improvements in his administration and practice, including sailing through his first audit with ease.

"As a new trustee, your first audit is a big deal," Mr. Hull said. "With the Auditor tool in *CaseLink²*, and support from my Account Manager, Andrea Hoffman, I went into the audit confident I had done my due diligence and properly administered my cases."



In addition to a stress-free audit, Mr. Hull has simplified his 341(a) meetings.

“I’ve become much more efficient in my 341(a) meetings with the 341(a) module in *CaseLink²*,” Mr. Hull said. “My 341(a) meeting spaces rarely have Wi-Fi, so I download my case data to use offline. Offlining the data is easy, and inputting my notes in *CaseLink²* has always been a smooth event for me. I couldn’t be happier with it.”

As the primary software user in his office, Mr. Hull has saved precious time on administrative tasks.

“*CaseLink²* saves me so much time each day,” Mr. Hull said. “It automates processes I don’t need to pay attention to. And, the things I do need to touch, I can make the lightest touch possible and get things done in half the time than with my previous vendor.”

“The more administrative stuff not on my plate, the more time I can spend working on my cases,” Mr. Hull added.

With its ease of use and features like the Alerts Panel keeping Mr. Hull on track, he is pleased with the way the software has enhanced his productivity. Plus, based on his experience with BMS’ data scraping solution, he never has to question if bankruptcy petition and schedule data is available in his system.

“My data is always imported accurately into the system, and I can depend on it to be there when I need it,” Mr. Hull said. “The software has made me so much more productive.”

Sterling Support... Plus Bankruptcy Expertise

Mr. Hull greatly appreciates the customer service he has received, especially from his Account Manager, Andrea Hoffman, who not only provides software support but also bankruptcy expertise.

“I email Andrea at absurd hours, and she is incredibly responsive,” Mr. Hull said. “It’s never taken her longer than an hour to get back to me. She’s phenomenal.”

“If I ever let BMS know about something I think can be improved in the software, I feel my recommendations are being considered,” Mr. Hull added. “My experience with BMS has just been a 10 out of 10.”

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