



AMERICAN
BANKRUPTCY
INSTITUTE

2022 Consumer Practice Extravaganza

Automating Your Practice with Expert Knowledge and Technology

Keith Crusius

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Dave Danielson

DebtCleanse; Chicago

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Lexria; Claymont, Del.



AUTOMATING YOUR PRACTICE
with
EXPERT
KNOWLEDGE
and
TECHNOLOGY





AUTOMATING YOUR PRACTICE

There are several businesses (experts) who are there to serve your interests (automation) and put your practice first so you can put your clients first!



AUTOMATING YOUR PRACTICE

Presenters:

Sally Rogers – Lexria (Intake)

Keith Crusius – JubileePRO (Case Management)

Dave Danielson – Student Debt Solutions



Being busy is not being productive!

The goal of any bankruptcy practice is two fold:

- (1) Provide the client with the best representation possible to give them a 'Fresh Start'.
- (2) To earn enough revenue to allow the lawyer to make a profit, derive income, and retire well.



Manage your time and resources

- You have a limited amount of time during the day.
- Your time should be spent doing the tasks that generate the most revenue – i.e. billable hours.
- Menial tasks should be outsourced to cheaper labor or third party providers.
- These are the experts in their field so you don't have to be.



ETHICAL CONSIDERATIONS

- Confidentiality
- Competence (ABA Rule 1.1)
 - A lawyer shall provide competent representation to a client. Competent representation requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.
 - This includes your ability to organize and manage your staff whom you are responsible for!



Automation Requires Organization

Organization Creates Consistency

Consistency Creates Success



Automation in Your Practice



All aspects of your practice have opportunity for automation

Consider: Where can you gain leverage?



Automation in Business Ops and Sales/Marketing



Lots of options in each area
of your business:

Paralegal Services

Marketing

Sales



Automation in Intake



Consider:

If this client information is
available at its root source,
how can I get to it faster,
easier?

The answer lies in Intake.



Automations in Case Management



Consider:

How to integrate all aspects of case prep filing and management.

Goals: Saving time, money and improving your client's experience and satisfying all their debt resolution needs



Automations in Practice Management



Consider:

How nimble and flexible do you need your practice to be?

Goals: How to integrate your firm's ecosystem to serve all your areas of practice beyond bankruptcy

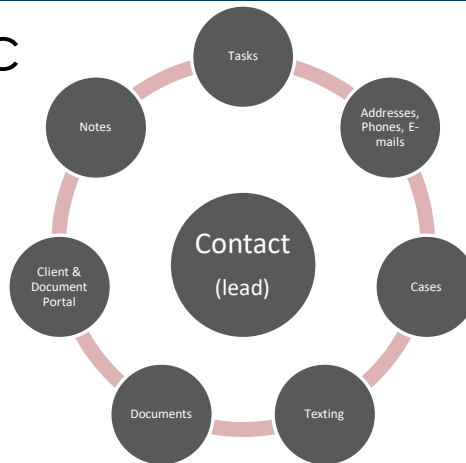


PETITION PREP CASE MANAGEMENT

KEITH CRUSIUS – JubileePRO / BKPro

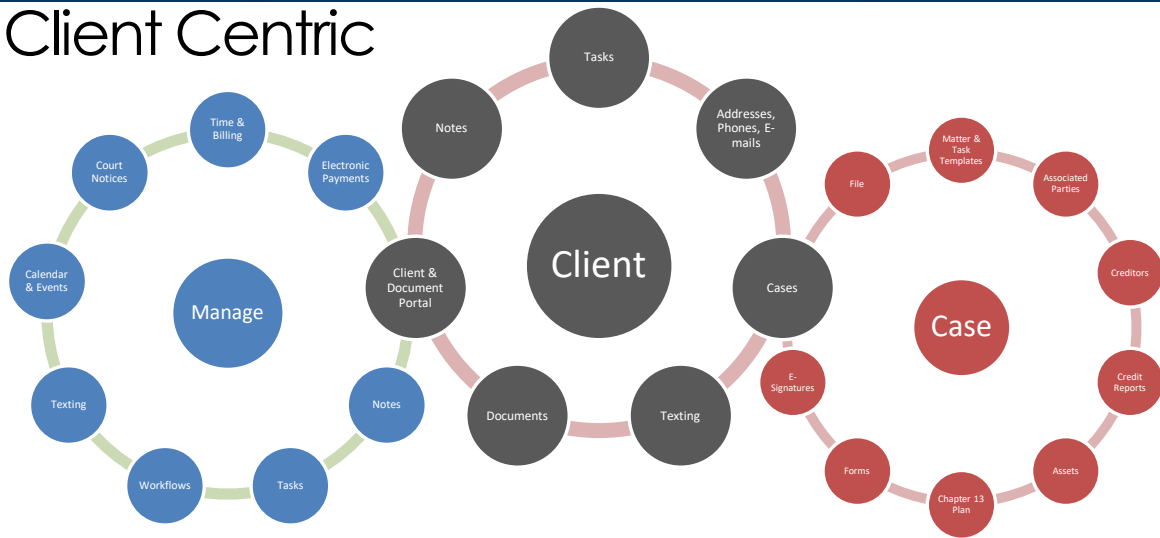


Client Centric





Client Centric



Automation leads to cost savings



Example:

61 parties 2 pp	COS	IN OFFICE	SAVINGS
POSTAGE	\$34.77	\$36.60	\$1.83
PRINTING	\$20.74	\$45.16	\$24.42
TOTAL	\$55.51	\$81.76	\$26.25 (33%)
Time spent	< 5 minutes	1.38 hours	



Harvard Business Review

According to the Harvard Business Review, firms that focused on the externalization of tasks grew an average of 38% over those who attempted to create solely internal efficiencies (i.e. they kept their work in house). This same model also resulted in far higher profit margins with fewer employees, and thus, fewer expenses.

38%





Financial Analysis

If your firm nets \$100,000.00 per year and you do nothing else but streamline and organize your operation to be productive and not busy, that same revenue jumps by up to 38%.

\$100,000 (net revenue)
 + automation and management
\$138,000 (net revenue)

This does not even begin to look at the time you save by managing outside resources and systems. Imagine the time you could save yourself each year.



Financial Analysis

If your firm nets \$100,000.00 per year and you do nothing else but streamline and organize your operation to be productive and not busy, that same revenue jumps by up to 10%.

\$100,000 (net revenue)
 + automation and management
\$110,000 (net revenue)

This does not even begin to look at the time you save by managing outside resources and systems. Imagine the time you could save yourself each year.



THIRD PARTY RESOURCES ALLOW YOU TO EXPAND YOUR PRODUCT AND SERVICE OFFERINGS

And increase your own bottom line.



Student Debt in Bankruptcy



- 1/3 of all consumer bankruptcies have student loan debt
- Less than 1/10th of 1% actually attempt discharge in bankruptcy
- Edge cases of private student loan debt can be discharged in bankruptcy but adversary proceeding is required
- It is difficult for a bankruptcy attorney to become a student loan expert limiting student debt solutions in bankruptcy
- New, **no-risk solution** for bankruptcy attorneys from Resolvent, LLC



Student Debt Solutions Highlights



www.myresolvent.com

- Client Self-service application
- Comprehensive analysis of all federal student loan repayment plans
- Counseling uplift as needed with non-profit Credit Counselors
- No risk to the attorney to be an expert on student loans



POST COVID is your opportunity

The Great Recession left many of us holding the bag with increased staff, increased expenses, and not enough cases when the wave worked its way through our offices.

The Post Covid Recession will be similar.

What lessons can you take away to avoid being left holding the bag this time around?

2022 CONSUMER PRACTICE EXTRAVAGANZA

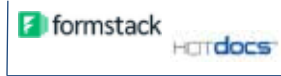
Transforming the Bankruptcy Law Practice: the tools and services of the future

Case Management

Intake



Document Management



Legal Noticing



Post-Case Management



Payment/Repayments



Preparation & Filing



Debt/Credit Counseling



Marketing & Sales



Complete Practice Management



Business Operations



Business Evolution



QUESTIONS?

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Keith Crusius – keith@legal-pro.com

Sally Rogers – sally@lexria.com

LEXRIA

MODERN
BANKRUPTCY
INTAKE TOOLS

INTAKE

PAY STUBS

FINANCIAL
ACCOUNTS

our partner

Jubilee
by LegalPRO

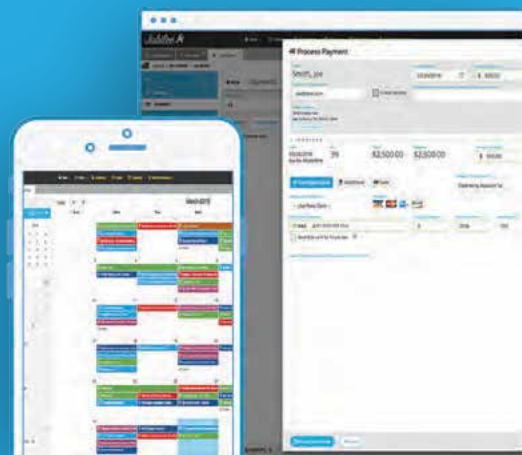
contact us

hello@lexria.com
lexria.com



SIMPLE POWERFUL
SOFTWARE *for the* **LEGAL**
PROFESSIONAL

Case Management
Bankruptcy
Court Notices
Legal Payments
Messaging
Billing & Invoicing
Time Tracking



UNLIMITED
Users, Matters & Contacts

What is Jubilee? **Affordable Software. Powerful Features.**

SIMPLICITY.

Save time, save money, be efficient.

Simplify, organize and automate your practice with robust case management tools, task orientated workflows and helpful reminders to help focus on what matters - your clients.

FLEXIBILITY.

Work from anywhere.

With a computer and an internet connection, your office is only a click away. Easy to run reports and intuitive dashboards will help you know exactly what you need to know about your firm, cases or clients.

SECURITY.

Peace of mind.

Secure 256-bit grade encryption supported by Microsoft Enterprise level security and real-time backups means your data is always protected.

“

I LOVE this company, This is the only company that we have software thru that if I have a problem I can call and someone answers and helps me immediately!

Law Office of Perry O'Brian

”



Case Management

Affordable Powerful Software
for the Legal Professional

Overview of Cases

Manage your cases
with ease in one single
place.

Time Tracking

Efficiently track time
spent on a case with
automatic timers.

Calendar

Organize contacts &
matter details in one
place.

Document Management

Securely upload, store
& share documents
firm-wide.

Tasks & Deadlines

Create task due dates
& reminders.

Automate Workflow

Automate your practice
with tasks and workflow
templates.

“

Best deal for the money and most flexible. Can have multiple people
work on case without paying multiple license fees.

Smeberg Law Firm PLLC

”



Bankruptcy

Petition Preparation, Electronic Filing

Bankruptcy E-Filing

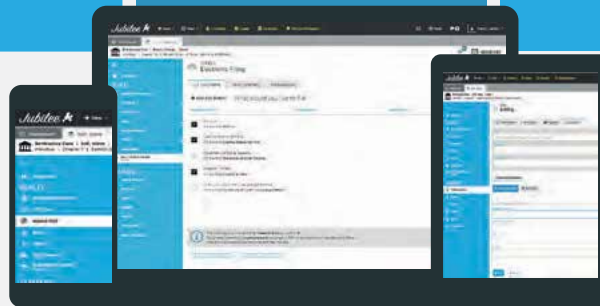
JubileeBK prepares required official forms and quickly walks you through the steps of filing. It supports Chapters 7, 11, and 13 filings.

Bankruptcy Calculators

A Means Test Calculator, an Exemption Calculator, and Chapter 13 Plan Calculator are included in Jubilee at no extra charge.

Multi-Vendor Integration

Our bankruptcy software integrates with many third-party vendors to help you get the job done quickly.



“

If I have a question, it gets answered immediately. Works with exciting credit report provider. I am happy and always tell fellow attorneys to switch to Jubilee.

Lewis Roberts, PA

”



Notices

Process Court Email & Track Hearing Dates



Save

Automatically save PDF documents and link them to the case.

Organize

Quickly filter your court notices by subject, docket text, date, case name, case number, or creditor name (from filed claims).

Schedule

Automatically schedule critical dates and Hearings to the Jubilee calendar.

“

I've used Jubilee Notices since it came out. I like having all the pleadings downloaded in one place where I can find them.

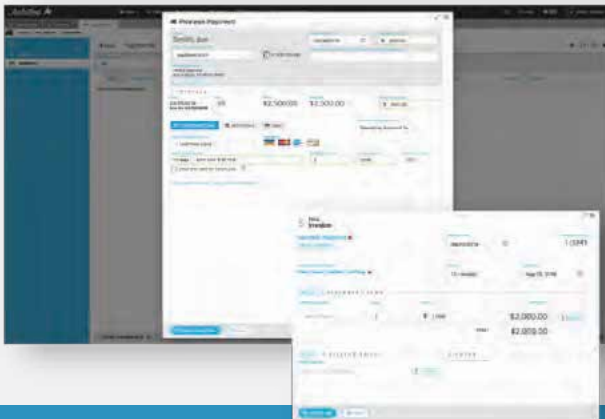
Travis Law Office

”



Legal Payments

Electronic & Recurring Payments



Flat Fee
3% per transaction



**No additional
Debt incurred.**

ACH, eCheck and debit card transactions are considered "cash equivalent" forms of payment.



**Billing &
Invoicing**

Set default billing or customize invoices and billing plans per case and per users.



**Trust
Accounting**

100% compliant with bar trust accounting rules for fiduciary responsibility and the IOLTA guideline for separation of earned and unearned income.

“

Got good support from customer service. Typing the zip code gives you the city, state, and county automatically.

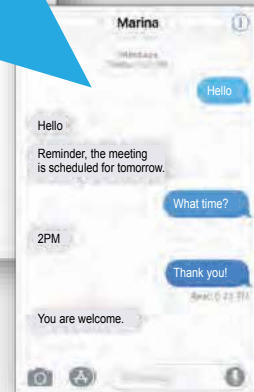
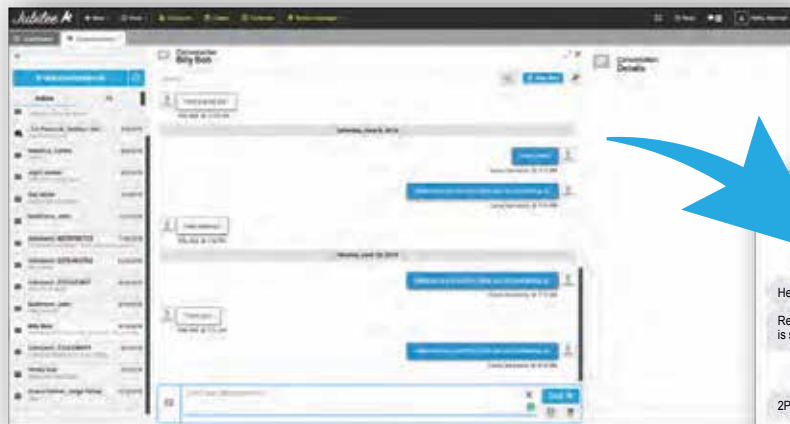
Sherman C. Smith, Attorney at Law

”



Messaging

Client Communication Made Easy



Real-Time Text Messaging

Professional Phone Number Provided

Get Notifications Within the Case

Simple pricing that scales with your business.

Filing Based Plans

Jubilee 36

\$45 / per month
\$495 paid annually

- ✓ 36 Included Filings
- ✓ Unlimited Users
- ✓ Chapters 7, 11, 12 & 13

Jubilee 300

\$75 / per month
\$825 paid annually

- ✓ 300 Included Filings
- ✓ Unlimited Users
- ✓ Chapters 7, 11, 12 & 13

70% of firms file fewer than 36 cases per year and, 98% of firms file fewer than 300 cases per year.

Unlimited Filing Plans

Jubilee Chapter 7

\$50 / per month
\$595 paid annually

- ✓ Unlimited Filings
- ✓ 3 Users
- ✓ Chapter 7 Only

Jubilee Unlimited

\$150 / per month
\$1,600 paid annually

- ✓ Unlimited Filings
- ✓ 6 Users
- ✓ Chapters 7, 11, 12 & 13

2% of firms file more than 300 cases per year.



3-Bureau integrated credit reports for **\$24.95 each**.

**SIMPLE POWERFUL
SOFTWARE**
for the
**LEGAL
PROFESSIONAL.**

Jubilee  **by LegalPRO[®]**
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support@legal-pro.com



www.jubileepro.com
www.legal-pro.com



It is really ease to use.
The interface is very efficient.
The customer service is excellent.

Law Offices of Thomas C. Flippin



I switched to Jubilee after using
Best Case for nearly 10 years.
Jubilee is much more cost effective
and user friendly.

Attorney Verna Bash-Flowers



***Serving over
1,000 firms
across the country.***



Faculty

Keith Crusius is the president of LegalPRO Systems in San Antonio, where he oversees the company's prepackaged software business. The company has been operating for approximately 27 years. Mr. Crusius has been developing bankruptcy software since the early 90s, when he started writing custom programs for a large firm in San Antonio back in the days of DOS. He joined the LegalPRO team part-time in 2005 as a developer and became the principal owner in 2011. His first goal after taking over the reins was to refocus the company on developing an online version of BankruptcyPRO, which was released in 2016 as Jubilee. Mr. Crusius also serves as a Battalion Chief in the San Antonio Fire Department, from which he will soon be retiring from after a 30-year career. He holds a B.A. in criminal justice.

Dave Danielson is CEO of Resolvent in Winter Park, Fla. Its flagship product, Student Debt Solutions, helps student loan debtors find reduced payments through government programs. Prior to joining the company, Mr. Danielson was the CEO for CINgroup, which served more than 15,000 bankruptcy firms with such products as Best Case Bankruptcy, CIN Legal Data Services and CINcompass. Prior to that, he was the managing director of LexisNexis's Small Law Client Development business, where its flagship product, Lawyers.com, served more than 25,000 attorneys. Mr. Danielson has served in a number of strategic-planning, marketing and executive leadership positions with numerous technology-enabled businesses over his more-than-30-year career, with a goal of improving operational efficiencies and consumer services.

Jay S. Jump is the founding principal of The Jump Law Group, LLC, a consumer bankruptcy firm in Pasco, Wash., as well as CEO of BK Attorney Services, LLC, a.k.a. CertificateofService.com, a mailing and notice service for bankruptcy professionals around the nation. He began practicing bankruptcy law in the Eastern and Western Districts of Washington in the late 1990s using technology to automate many of the functions that a bankruptcy attorney had to complete to get a successful case to discharge. This automation led to the creation of CertificateofService.com in 2005, when Mr. Jump became frustrated by the overwhelming amount of mail that had to go out every day in his chapter 13 practice. What started in the back corner of the law office 16 years ago has expanded to the premiere mailing service for more than 4,700 debtor and creditor firms, panel trustees, and chapter 13 trustees. Along the way, he has been a frequent speaker at the various bankruptcy conventions, has written several articles regarding law office automation and technology application, and assists with connecting bankruptcy practitioners with partners who can bring their practices to a higher level of productivity. Mr. Jump received his undergraduate degree from the University of Arizona and his J.D. from Gonzaga Law School.

Sally Rogers is the CEO of Lexria in Claymont, Del., which provides modern, efficient intake tools for bankruptcy attorneys. Prior to Lexria, she founded a brand partnerships platform for small businesses. Earlier in her career, Ms. Rogers worked in finance and consulting at Wellington Management Company and Deloitte.