

# Robert Waldschmidt Office Unchained from Desktop Case Management System

## BACKGROUND

Robert Waldschmidt is a bankruptcy trustee in the Middle District of Tennessee and an NABT past president. The Waldschmidt office had been using the same bankruptcy case management software for many years, but it was a desktop system and they were ready to become a virtual office. "I've been doing this for years and I didn't want to be chained to a desktop anymore," said Lori Grahl, a long time trustee assistant. When it became apparent that their vendor would not be able to offer a Web-based solution that met their needs, the Waldschmidt office chose to look at alternatives.

## CHALLENGE

To find the right solution the Waldschmidt office conducted a thorough review of the top bankruptcy case management solutions. They put together a list of all their business requirements and provided it to the vendors. Each vendor was given the chance to demonstrate how well their product met the business requirements. After the TrusteSolutions demonstration, the Waldschmidt office visited a TrusteSolutions customer in their region to see how that team maneuvered around the software. They contacted several trustee assistants who spoke highly of both the TrusteSolutions software and the company.

The Waldschmidt office was concerned about the conversion and requested some information about the process. "Instead of receiving a generic sales pitch letter, I was sent an in-depth, detailed timeline," said Ms. Grahl, "It impressed the socks off of me because I could see how long it was going to take, what happened in each step, and how streamlined the process was going to be."

The Waldschmidt team picked TrusteSolutions because it was clear that TrusteSolutions cared about its customers, the software was easy to use, and most importantly it was a Web-based program.

## CONVERSION PROCESS

The conversion process took place over a two week period and went smoothly.

*"Life is so much easier. The best part is being able to work from home or wherever I am. I want to stay with TrusteSolutions until I retire," Ms. Grahl offered.*

In addition to the detailed timeline, TrusteSolutions provided the Waldschmidt office with all the banking information the United States Trustee Office needed to approve the switch, and a comprehensive client profile document for the Waldschmidt office to complete.

The conversion began with a conference call that included everyone from the Waldschmidt office, TrusteSolutions, and the bank. "The placement of a conversion manager was excellent because we knew who to contact if anything came up. By the end of the meeting we knew who was responsible for what at TrusteSolutions and the bank," said Ms. Grahl.

TrusteSolutions worked with the local IT rep that the Waldschmidt office normally employed for on-site technical service. "We knew when all the equipment was coming in and the shipment was neat and orderly," commented Ms. Grahl. The IT rep switched the equipment and cleaned personal data off the old desktops before they were sent back to the previous vendor.

"Communication was excellent during the two week conversion process. Every day we knew when someone was going to call and if we were busy we could get back to TrusteSolutions through email, chat, or phone at our convenience," recalled Ms. Grahl.

With the software, hardware, and data in place the Waldschmidt team was ready to learn the new system. They spent two and a half days working hand in hand with the TrusteSolutions trainer to learn everything they needed to know to be successful.

After training, the Waldschmidt office was assigned to a specific customer service representative. “Our customer service representative is great. I never have to guess who to call when I need help. She always lets us know what’s going on and who to contact if she is going to be out of the office,” said Ms. Grahl.

## RESULTS

Almost immediately, the Waldschmidt office began to see the benefits of being on a Web-based system. While attending a conference, Mr. Waldschmidt found that he needed to work on and submit important documents to the court. He was able to complete his work via the Web while at the conference. Ms. Grahl shared, “I experienced the need for an online solution first hand. We had devastating floods in Nashville. I live 40 miles and 3 flood zones away from the office. There was no way I could get there.” With TrusteSolutions she was able to work from home without skipping a beat.

“Life is so much easier. The best part is being able to work from home or wherever I am. I want to stay with TrusteSolutions until I retire because they keep up with current technology. We feel much more up-to-date,” said Ms. Grahl.

## ABOUT ROBERT WALDSCHMIDT

Bankruptcy and insolvency law is the focus of Bob Waldschmidt’s practice. As a former president of the National Association of Bankruptcy Trustees (1998-1999), he has served as trustee in over 50 reported bankruptcy decisions that have helped define trustees’ rights under the Bankruptcy Code. He has been a bankruptcy trustee since 1976; first under the Bankruptcy Act, then as a Chapter 7 panel trustee under the Bankruptcy Code after it was enacted in 1978. He has also been appointed receiver in federal and state cases. Mr. Waldschmidt serves as trustee and as receiver, and represents debtors/creditors/trustees/receivers in insolvency proceedings.

Mr. Waldschmidt has testified before the House Subcommittee on Bankruptcy Reform, has chaired several legislative committees and has spoken at numerous seminars, both locally and at a national level. He appeared numerous times before the Bankruptcy Review Commission when it was meeting to consider proposals for changes to the bankruptcy laws.

## ABOUT LORI GRAHL

Lori Grahl has been the paralegal for Bob Waldschmidt since 1985. She is a graduate of Trevecca University (B.A.) and the Southeastern Institute for Paralegal Education (Certificate). She has been actively involved with the National Association of Bankruptcy Trustees since 1989, and was instrumental in the development of the Trustee Assistant Program for that association.

## ABOUT TRUSTESOLUTIONS

TrusteSolutions is a division of Financial Software Solutions, LLC, a Houston-based software company that provides bankruptcy case management software to trustees across the United States. The TrusteSolutions software program is Web-based and highly customizable.

With its sophisticated and intuitive tools, trustees can create custom reports, import claims and assets, archive files and cases, and perform a host of other tasks.

To learn more about what TrusteSolutions can do for you visit the Web site at [www.trustesolutions.com](http://www.trustesolutions.com).