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“Extraordinarily fast” conversion by TrusteSolutions has trustee up and running quickly.

Background

Susan Seidel of Plano, Texas, works alongside her husband of 33 years, Scott Seidel, who has been a panel trustee in the Northern District of Texas for all of those 33 years. When not handling Subchapter 5 and Chapter 7 bankruptcy work, Scott can be found working for veterans’ causes. For 10 years, Susan and Scott used a desktop-based case management solution. After more than a year of wanting to move to a web-based system, she decided a change was needed.

Situation

After viewing the TrusteSolutions web-based product and meeting the entire team, she could see how devoted they were to delivering the very best software to their trustees. The right time to make the switch came in the Fall of 2019. A large, substantively consolidated case with over 2,000 filed claims had gone to TDR and the conversion of their data would be fast with that case now out of their files.

Susan looked at other web-based providers but none had the user-friendly and intuitive software interface she was seeking. She liked the fact that TrusteSolutions has people on staff with experience working in trustee offices. Susan decided to go with TrusteSolutions, a proven case management software built from the ground up on the web.

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Solution

According to Susan, the conversion was “extraordinarily fast.” Susan and Scott were up and running on the TrusteSolutions system in what seemed like virtually overnight. “Long gone are the weeks to convert your data and install new software. It is all done behind the scenes by professionals who do this day after day.”

Two months after converting to TrusteSolutions, Susan had a family emergency to tend to that required her to work remotely for over a week from a hospital room. This occurred immediately before their TIR reports were due. With TrusteSolutions’ remote, web-based access, she didn’t miss a beat. Susan shared, “Mobility helps you stay ahead of it all. With a secure Internet connection, you can work where, when and how often you want. This really came into play during the COVID-19 pandemic, too. So many of the attorneys we work with and fellow trustees in our district could not work from home nor could their staff. We never missed a beat!”

Susan enjoys the freedom and flexibility being web-based offers. “I can take it with me anywhere. Even on vacation when I *shouldn’t* be working, I can still have it with me if I need it, because we all know emergencies happen very frequently.” She adds, “Being web-based versus office-based, there’s no comparison. Scott was skeptical about the web application and the security, but our office IT professional verified through his own examination that TrusteSolutions is safe and secure.”

When describing the TrusteSolutions platform, Susan calls it *individualized, personalized and customized*. She likes that her home screen can reflect her choices and her trustee’s home screen can look totally different. “The choices and options

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are incredible. You can even personalize the color of your home page background.” As for productivity, Susan likes the following features:

- **Task functionality and visibility** – the trustee can prioritize tasks in the system and they can instant message one another (using Teams) to communicate for added efficiency. The trustee can also see when tasks are completed so there is no duplication of work. Information is readily available so the productivity of assistants can be seen whether they’re working on-site or off-site. Tools such as Zillow, NADA, county appraisal districts, Kelly Blue Book and Lexis Nexis (their personal subscription) make value confirmation effortless. The system is also very visual and customizable. TrusteSolutions color coded items for Susan to meet her specific needs as well as changed fonts to suit her choices.
- **Banking simplicity** – all deposits now go out electronically instead of shipping them overnight, saving both time and money. Susan tells us, “Banking has been really great. I can count that off of my list of things to do daily. It’s been so easy.”
- **341 meeting efficiency** – Susan shares that this has been one of the best enhancements in the software for their office. In each case, there is an opportunity to include additional information, such as driver’s license numbers and appearing attorneys, as well as a checklist for the office to populate that keeps everyone on track. Susan says this is a “wonderful feature my prior software doesn’t have.” She adds, “The schedule review report is Scott’s favorite feature. While I prefer a paperless office, Scott prefers to have each case on paper in front of him for the meetings and for his files. The schedule review report gives him a snapshot of the case and TrusteSolutions has personalized it to his request. This greatly increases my productivity preparing for 341 meetings and coming back from them.” While they are currently doing telephonic 341 meetings today, Susan can add audio files of the meetings right into the cases in the system. All these functions and more have changed meeting prep from an hour for each case to 6-7 minutes per case, greatly increasing productivity.

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In Conclusion

Susan and Scott appreciate the added control and security with TrusteSolutions. Rights can be assigned to all users by the trustee for those working remotely or in the office setting. She also notices the stability of the cloud-based platform that allows her and her trustee to both be in the same case at the same time with no problems at all.

If Susan ever gets in a bind, she can rely on the TrusteSolutions support team to WebEx in and assist her. The responsiveness, added productivity, efficiency and portability TrusteSolutions delivers has made a positive impact on this trustee office. Susan has already been sharing her praise of TrusteSolutions with other Dallas-area trustees. One in particular is handling multiple complicated claim objections. Susan told him, “TrusteSolutions has a screen just for that.”

About Susan Seidel

Susan Seidel is a trustee assistant who has worked with her husband, Scott, for the past 10 years since he left his downtown Dallas law firm to start his own practice. Scott will tell you it seemed like everyone he knew told him 10 years ago, “it will never work, no one goes out on their own with their wife working as their staff.” He quit counting the calls during the recent COVID-19 pandemic from colleagues, friends and former naysayers who told Scott he has had it right for the past 10 years and they need to catch up with him. Susan concludes, saying, “2020 is the year everyone needs a TrusteSolutions to keep their office successful.”

About TrusteSolutions

TrusteSolutions, a division of Financial Software Solutions, LLC, is a Houston-based software company that provides financial case management software to bankruptcy trustees and insolvency professionals. Our enterprise-level software and infrastructure originated on the web for increased mobility, enhanced reliability and security and greater performance. As an industry leader, clients can rely on our extensive customization framework, mobile applications and social/collaborative platforms to propel their efficiency and productivity so they can TAKE CONTROL. WITH CONFIDENCE. Learn more at trustesolutions.com or call 866-878-7831.