

## [CASE STUDY: JDKATZ ATTORNEYS AT LAW]

Welcome to JDKatz, P.C. ([www.jdkatz.com](http://www.jdkatz.com)), a Bethesda, Maryland-based award-winning law firm which grosses over \$1 M in annual revenue. JDKatz comprises attorneys, CPAs, JD/LLM's and support staff and advises clients in the areas of tax, estate planning, real estate, corporate and litigation. Their clients span C-level executives to retirees and the aged. The firm seeks to communicate their values of trustworthiness, fidelity, care for their clients, and consistent performance in every interaction.

### [OVERVIEW]

JDKatz identified the demonstration of trustworthiness from the outset of the client relationship as key. While many law firms set a goal to make their clients feel cared for, they often lack the infrastructure to consistently convey care and concern.

The first opportunity to communicate care for clients after taking the appointment is the appointment reminder. This simple act of kindness was fraught with unanticipated pitfalls. Reminder calls were often missed, and when they did connect, clients often feared they were being billed for the personal reminder (they weren't). The result was late or missed appointments and lost office time chasing clients for rescheduling and giving directions or other information.

Founder Jeffrey Katz persevered. Jeffrey evaluated software that would automate the reminder and work with ScheduleOnce, Outlook and Google™ calendars at a reasonable price.

He chose Apptoto.

### [REQUIREMENTS]

#### [Versatile so it serves all clients]

Apptoto sends reminders by voice, SMS text, or email. 15-20% of JDKatz' clients are elderly clients who do not have email. Many do have cell phones and appreciate the text or the voice reminder.

#### [Easy to use]

Apptoto is easy to use; the system is intuitive. JDKatz set it up to work with the Google™ calendar application in 15 minutes.

#### [Customizable reminder scheduling]

For JDKatz, text messaging has been most effective, with a couple of reminders scheduled. The last reminder is sent 30 minutes before the appointment and contains parking directions on a web page link.

#### [Seamless integration]

Apptoto schedules reminders for multiple calendars to serve multiple staff members and all clients.

## [RESULTS]

### [No more missed appointments]

Jeffrey Katz summarized Apptoto's value saying, "The solution hit it out of the park - our clients perceive our firm as accessible, committed, showing genuine concern for their well being, and respect for their time. Reminders serve as a concrete way to demonstrate these values. Clients know that the staff is concerned about them, but that the automated call or text is not being billed to them, so they appreciate it more. We message that we are on top of their file. And It happens every time, so it communicates another JDKatz value - consistency. And it sends the message: *We care.*"

"Originally, we didn't think we could afford a reminder service, but our overall Apptoto experience has shown us that we can't afford not to have it."

Jeffrey Katz, Managing Partner  
JDKatz, P.C.



Sign up for Apptoto today at no obligation.

**Free trial available.**

No credit card required.

**AUTOMATED APPOINTMENT MESSAGING SERVICE**