



## TFB plc – Product Review

# TFB Digital Dashboard – putting you in the driving seat

The legal software supplier, TFB has just launched a new reporting tool called the Partner for Windows Digital Dashboard. In this article, leading legal technology journalist Charles Christian taps the gauges and considers why TFB's system could have the edge on the competition...

As law firms become increasingly sophisticated in their approaches towards practice management, more and more software suppliers are introducing management reporting tools that will allow their users to carefully monitor business critical information such as key performance indicators (or KPIs). In other words the types of information (performance against targets, write-offs, unbilled WIP, etc) that cause partners, practice managers – and fee earners sleepless nights.

TFB is the latest supplier to introduce this functionality with its Digital Dashboard, a name picked because of the obvious motoring analogy, in the sense that to get the best out of driving a car, there is a lot you need to keep an eye on, such as speed, fuel consumption and much more.

For example, the TFB system currently comes complete with a suite of 30 reports – and more are on the way. All reports can be displayed in graphical formats – pie charts, line graphs, hi-lo and tabular formats – which adds to their impact and immediacy. Different users within a firm can have different dashboards, so they only see the reports that are relevant to their needs. Thus fee earners can monitor their own personal performance,

department heads will see how their teams are doing, while senior managers and partners have access to information on a practice-wide basis.

The information all has links to 'drill downs' so you can get behind the figures to identify specific matters, clients, fee earners or transactions where there may be issues to examine in greater detail. You can even start time recording or processing a case directly from Digital Dashboard.

I would imagine most users would find the 'top 10' and 'bottom 10' reports – my top 10 billing case types, my bottom 10 billing clients, etc – make for fascinating, if sometimes not a little worrying reading. And, I personally liked the way Digital Dashboard makes it relatively easy to reorganise the shape and layout of the reports (something other reporting systems often fall down on) to suit users' personal preferences and their overall desktop requirements.

All good stuff but, to some extent, there is nothing here in Digital Dashboard that cannot be found in other KPI reporting systems. So, is there anything else that makes the TFB system stand out among what is becoming an increasingly crowded market space?





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Undoubtedly one differentiator is that TFB Digital Dashboard can generate KPI reports not only from primarily financial-oriented practice management information but also from case and matter management data. This is possible because Partner for Windows is a fully integrated case and practice management system built around one central database – if it is on the system, Digital Dashboard can access it. So, for example, fee earners and secretaries can use the Dashboard to monitor their tasks and active matters lists, whereas more senior managers could use it in more of a risk management capacity to ensure milestones and deadlines are not being overlooked.

But, probably the key differentiator – one I have not encountered before with similar products – is that Digital Dashboard is available free of charge as a no strings attached upgrade. Yes, you have to be on a current maintenance contract and running at least version 2.27 of Partner for Windows on a Microsoft 2000 platform or better – but that is it. No hidden extras and No usage fees although some firms may need minimal training.

Interestingly, TFB have eschewed the more usual one-size-fits-all approach suppliers take with upgrades by making it entirely optional. If you don't think you need the Digital Dashboard system – well at least not yet – you don't have to use it.

But, if you do want it, then download the software, register your licence and TFB will ensure you are supplied with updates, which in the near future are likely to include additional reports. Law firms frequently complain they get a poor return from their maintenance contracts but the TFB proposition here certainly bucks the trend.

### What else do you need to know about Digital Dashboard?

One very interesting feature it can be configured so the Dashboard is the first thing users see when they log into Partner for Windows. Data, incidentally, is automatically refreshed so it is always the latest information that is displayed. Indeed the management of some of the firms that piloted Digital Dashboard said this was exactly what they had been looking for: a system that could provide an immediate snapshot on current performance – rather than the historical data you get from conventional month-end reports. And, a proactive system that removed the need for managers to keep notifying staff they were not hitting their target.

With Digital Desktop, there is no excuse for not being firmly in the driving seat, whether you are a fee earner or a practice manager. At this point I would normally suggest you really should consider buying this system but of course in this instance you don't have to, as it's free!

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