

Law Practice Type: Outside General Counsel Solutions™, a complete outsourced general counsel practice

Number of Users: 20 and growing

Problem

Santomassimo Davis LLP is a unique specialty law firm providing a wholly outsourced and full-service Outside General Counsel™ solution to midsize companies that do not have the resources to run their own in-house legal department. The team of attorneys and support staff at Santomassimo Davis works together to provide virtually all legal services a midsize company needs to mitigate risks and address issues as they arise, at a fixed, predictable and manageable fee.



Several years ago, leaders at Santomassimo Davis realized the role technology could play in the strategic growth of the firm. At the time, the CRM platform they used was not powerful enough to accomplish their goals. They were dissatisfied with their case management software, because it ran on internal servers, was not being updated by the provider and did not offer an option for mobile work. They also could not connect it with their document management software, a situation that proved to be inefficient and primed for potential errors. They knew that having one system of record – with a powerful marketing engine and integrated case management, accounting, reporting dashboards and more – would fuel growth and set them apart from other law firms.

Solution

When the firm started researching new technology, Salesforce and AdvoLogix – which is built on the Salesforce platform – quickly filtered to the top of the list. Salesforce offers powerful marketing tools to help law firms develop new clients, nurture existing clients and reengage past clients. With thousands of integrated apps like AdvoLogix available on the App Exchange, the Salesforce platform has the power to provide all the tools a law firm needs to run its business and grow.

AdvoLogix allows all of a firm's team members to have all case information and documents at their fingertips, driving efficiency because they never need to ask others for information or status reports on client matters

With the addition of Accounting Seed – accounting software also available on Salesforce's App Exchange – which was integrated by AdvoLogix partner Practice Development Partners, the leaders at Santomassimo Davis gained reporting and dashboards that help them make agile and data-driven business decisions.

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Result

AdvoLogix empowers all the legal professionals at Santomassimo Davis LLP to be more productive. Because of the automations, workflows and integrations, they can focus on value-added and more satisfying projects and less on mundane tasks such as time sheets and data entry. The platform has allowed the firm to grow without increasing support staff.



Christopher Santomassimo
Partner of Santomassimo
Davis LLP

Because it is cloud-based, AdvoLogix makes the team at Santomassimo Davis LLP more independent. They can work from anywhere in the world and continue to have access to everything they need to keep their practice operating smoothly and their clients happy. Unlike other firms which were not prepared to work from home when the need arose in 2020, Santomassimo Davis offered continuous operations, retained all staff and experienced growth by bringing on new clients. AdvoLogix put the firm in the perfect position to weather the storm.

System & Data Integrations:

- Worldox
- Accounting Seed
- Salesforce CRM

About AdvoLogix®

Founded in 2006, AdvoLogix®, is a leading law practice and legal matter management solution that helps law firms and general counsel automate unique business processes and simplify legal matter management. The AdvoLogix cloud-based enterprise solution centralizes matter management, conforms to unique workflows and practice standards, and provides industry leading security and reliability. Built on the leading cloud platform, Salesforce®, AdvoLogix offers comprehensive configuration and integration with thousands of add-on applications to extend the solution to meet specific business needs.

Contact our team to get started with a personalized AdvoLogix experience.