

Law Practice Type: Civil, Criminal, Medical, Personal Injury, Class Action, Mass Tort

Number of User: 30

Other integrations are increasing productivity and simplifying processes within the firm. Documents are now managed in context with matters because they are directly linked to the collaborative NetDocuments file repositories. Docusign is used as part of the intake process so that new clients are onboarded in minutes using eSignatures. The firm now has a completely paperless intake and onboarding process for new clients. Accounting Seed integrates all financials into their practice management platform, providing expense approval processes and end-to-end visibility into the finances of their business. Attorneys leverage Salesforce for mobile and tablet practice management and client intake to improve their work mobility. MFM has implemented reporting throughout all legal and business processes to manage KPIs and evaluate performance. AdvoLogix has transformed the firm's business and puts it in a position to maintain a technologically advanced practice, allow attorneys to manage a larger work load resulting in better top line revenue, and easily scale the business to support current and future rapid growth mode.

System and Data Integrations:

- NetDocuments cloud management system
- Calendar Anything for case-specific calendars
- Accounting Seed financial accounting system
- PDP Partners Practice Packs for AdvoLogix

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.

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Problem

Murphy, Falcon & Murphy (MFM) is a well-known consumer law firm on the East Coast of the United States. The firm was poised for a high growth rate and to launch a successful referral management program. However, they lacked the processes and advanced technology handle the diverse practice management approaches for their various practices. They had no process for proper client intake across all areas of practice. Document management was in disarray.



Solution

MFM selected Advologix Matter Management with a custom client intake questionnaire system to streamline processes, improve case management and ultimately provide better client service. To successfully launch the referral management program, MFM integrated their external call center, which uses Sites pages in Advologix-/Salesforce to create records for clients and matters to be triaged, evaluated, referred or taken on. The call center integration provides a referral tracking process for cases the firm referred to other firms, with reporting to track referred out status and financial information.

The firm solved the problem of responsibility and ownership of cases by using AdvoLogix to create a fully automated internal workflow throughout the matter management process. Some automation features they use include:

- Creating templates of activities to be carried out to for each type of matter
- Scheduling of orders with calendar invites
- Triaging and assigning matters based on skills or specialty

The firm adopted Salesforce Chatter to improve collaboration and reduce email clutter. MFM's professionals are automatically following their matters within Chatter. Chatter gives them guaranteed visibility to the matter information they need to follow. It also logs communication history within matters and aids communication between subject matter experts and other professionals in dedicated legal Chatter groups.