AdvoLogix

Poarch Thompson Law

Case Study

Law Practice Type: Immigration and adoption
Number of Users: 25

Background

Since the beginning, Poarch Thompson Law has been a leader. Woman-owned and managed since its founding by Christine Poarch in 2003, the forward-thinking firm began the process of consolidating its practice and business management platforms when a second attorney joined her back in 2010.

After implementing Salesforce, Poarch Thompson sought a scalable solution capable of integrating with a variety of tools from the AppExchange to run the firm more efficiently and to position it for continued growth. As part of the Salesforce ecosystem, AdvoLogix was the clear choice for law practice management.

AdvoLogix Results

Implementing AdvoLogix in 2011 required some customization for Poarch Thompson, which primarily uses a fixed-fee billing model rather than the traditional time-based model. Once adjustments were made to accommodate trust accounting, the firm proceeded with other system integrations and has built on the platform ever since.

Today, Poarch Thompson uses AdvoLogix to track and manage every activity, every day – every lead, every client, every matter. The platform provides a unique level of standards, accountability and reporting that enables the firm to manage its entire business with timely and accurate information. AdvoLogix functionality that improves outcomes and helps the firm make better business decisions includes:

- Structured processes that ensure consistency in work product

- Automated budgeting for every matter type that promotes uniform pricing

- Revenue tracking to each practice area that enables resource allocation based on current needs and growth areas, as well as ROI measurements on marketing or other lead generation activities

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Business Intelligence

Poarch Thompson uses AdvoLogix extensively, with key integrations of other tools including email for truly streamlined workflows and business management. Firm leaders rely on the AdvoLogix dashboard for a snapshot of everything going on in the firm every day. They especially find the reporting and metrics invaluable, from which they can pull and segment data, analyze it and communicate effectively. The ability to make decisions based on this data is invaluable to Poarch Thompson.

> "Our firm originally selected AdvoLogix for its scalability and integration with other tools from the AppExchange. Today, our entire business runs on the AdvoLogix platform. The intelligence and accountability provided help us make informed decisions. I really don't know what we'd do without it."

Joey Poarch
Chief Information Officer
Poarch Thompson Law

System & Data Integrations:

- Conga (document generation, e-signature)
- Texty SMS
- NetDocuments
- Woobot (Slack integration)
- LawPay

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.