HOW WE DIGITIZED THE DOCUMENT APPROVAL WORKFLOW FOR LEGAL SERVICES INDUSTRY

A case study on streamlining document approval workflow for enhanced client management

KEY METRIC

Digitisation of the document approval process led to increased efficiancy, and additional attention toward other functions.

Accelerated Workflow

SUMMARY

The legal services sector prioritizes customer experience and satisfaction as vital components of business expansion. Our client, a U.S.-based law firm specializing in immigration-related matters, serves the American populace in navigating the intricate landscape of immigration protocols and documentation —a process subject to stringent scrutiny. Handling numerous document approvals had become burdensome for our client, given the substantial volume of immigration cases they manage. In response, we developed a digital workflow solution to streamline document management and simplify the approval process for our client.

BUSINESS CHALLENGES

The conventional document approval process followed several steps:

1. Customers received a draft document for review and consent to the specified terms.
2. The document was then sent to the attorneys for their countersignature, initiating the immigration procedure.
3. Once received by the attorneys, the document's approval status was updated within the CRM.
4. Subsequently, a hard copy of the document was printed, signed, and re-uploaded to the CRM.

However, this process proved time-consuming, particularly when attorneys identified unconsented terms or errors that rendered the document's approval and authenticity void. In such cases, the workflow had to be restarted, resulting in the inefficient use of professional resources and a suboptimal customer experience.

**Error-free document
approval**

**Complete data
security**

**Accelerated
workflow**

SOLUTION PROVIDED

In our analysis of the existing process, two significant obstacles
emerged:

1. Physical document printing posed a risk of data tampering once it
   left the system.
2. Convenience challenges were faced by the attorneys due to their
   demanding workload.

To address these issues, we established a simplified digital
ecosystem for the document approval process, consolidating
documentation workflows with foolproof measures:

- Attorneys were provided with credentials for seamless document
  approval from customers.
- The attorney's signature was automatically stamped using robust
  digital authentication.
- All involved parties were promptly notified of any changes,
  ensuring data remained within a unified ecosystem.
- This cloud-based, secure approach transformed document
  management.
- Corrections were handled efficiently through attorney notifications
  with highlighted areas, eliminating the need to restart the entire
  approval process from scratch.

IMPACT ON BUSINESS

- Digitizing the document approval workflow led to a considerable
  increase in operational efficiency within the law firm.
- This digitization resulted in a significant acceleration of the
  workflow, enhancing attorney productivity.
- Attorneys were able to expedite case closures more effectively and
  successfully.
- The digital workflow effectively managed continuous changes and
  facilitated secure signatures from all relevant parties.
- As a result, the customer experience witnessed a substantial
  improvement.
- Immigration attorneys were able to allocate more time to strategic
  planning and goal achievement.

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