

HOW WE TRANSFORMED CRM FOR ENHANCED USER AND CUSTOMER EXPERIENCE IN THE LEGAL SECTOR

In this case study we talk about a CRM customization that creates an end-to-end CRM tool to perform all the functions for the front, middle, and back-office

BUSINESS CHALLENGES

Our client faced challenges related to profit leakages occurring across various departments. As their business continued to grow, these leakages became more pronounced, highlighting the need for a solution.

Legacy processes in place were cumbersome for both customers and users, adversely affecting their overall experience.

Despite being in a niche industry, our client was using a generic Customer Relationship Management (CRM) tool. The client's business had distinct functions that required CRM customization to address specific challenges. These included the need for process automation and the integration of various systems and applications into their CRM system.

The client encountered the following issues when using a generic CRM:

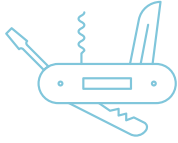
- Challenges in case tracking
- Inconsistent operational workflows
- Rising labor expenses
- Errors in standard business processes
- Difficulty in lead tracking
- Limited customer engagement
- Minimal marketing collaboration

KEY METRIC

A unified CRM platform resulted in enhanced data management, streamlined decision-making, improved user productivity, and an elevated customer experience.



Enhanced User and Customer Experience



Comprehensive tool for all business functions



Streamlined data flow informed strategic decisions



Enhanced User and Customer Experience

SOLUTION PROVIDED

At the heart of every business is the customer, making CRM the pivotal system. We empowered our client by enhancing their CRM, customizing features to align with their customer-centric needs. Integration was seamlessly executed to minimize business disruptions, focusing on one module at a time.

The following details our solutions to specific business challenges and their impact:

- **Client Merge Tool:** We automated client merging to eliminate duplication and enhance case management.
- **e-Sign Process Integration:** Integration of e-signatures simplified digital document signing and storage.
- **Invoice Generation Automation:** Automated invoice generation reduced manual work and errors.
- **Mass Engagement Process:** Streamlined communication with multiple clients, saving time and improving engagement.
- **Drip Marketing Tool:** Custom drip marketing tool for running multiple campaigns and reminders.
- **Document Approval:** Simplified document submission and approval, enhancing efficiency and tracking.
- **Chat Automation:** Integrated chat within the CRM for efficient, trackable client communication.
- **Billing Automation:** Developed a billing automation tool for real-time payment processing with customization options for unique business needs.

IMPACT ON BUSINESS

Our automation and integration efforts led to a holistic transformation of the CRM platform, resolving the challenge of managing multiple outdated systems. This streamlined data flow improved strategic decision-making, greatly enhancing the user experience and productivity. Additionally, our focus on customer-centric tools improved the overall customer experience.

