



Sokolove Law Implements a New CRM System to Support Growth

Lansdale Group helps Sokolove Law achieve growth while providing world class service and support to clients and legal partners with a new CRM system based on Salesforce.com.

CLIENT'S CHALLENGE

A nationally recognized leader in the legal industry, Sokolove Law was rapidly implementing new business initiatives to take advantage of emerging market opportunities. To support these initiatives and resulting expected growth, Sokolove recognized that they needed a more flexible and scalable CRM platform. With its strong technology platform and large ecosystem of technology partners, Salesforce.com was the obvious choice. Sokolove serves injured parties through a large network of qualified affiliate law firms. Sokolove invests substantial funds in marketing activities to acquire new clients and handles a large influx of potential clients each day through web

and phone based inquiries directed to a large call center. Therefore, Sokolove requires a CRM system that not only allows Sokolove staff to track return on marketing investments, but also efficiently qualifies, sorts, and assigns large numbers of inbound leads through a complex, multi-step qualification process including call scripting, follow up calls, automated qualification scoring, document fulfillment, and automated case assignment. Moreover, the system must also support continuous interaction and mutual updates of case status and other related case information between Sokolove and its many affiliates to support an optimal customer experience.

"The Lansdale Group was an excellent partner for our Salesforce implementation. They were a pleasure to work with, did some very heavy lifting to ensure the success of our complex deployment, and managed to stay within budget. Their consultants have a strong understanding of the business, which was critical for the new solution to work smoothly. Lansdale truly takes ownership of the success of your project, something that is all too uncommon in the consulting world."

Matt Nerney, VP of IT, Sokolove Law

LANSDALE GROUP'S SOLUTION

Sokolove needed a partner with deep Salesforce expertise, superior requirements and design skills, and a track record for creative and elegant solutions to complex problems. After a disappointing start with a much larger consulting partner, Sokolove sought and found a partner they could trust to efficiently shepherd the project to a successful completion in the Lansdale Group. With an existing, heavily customized CRM system as a yardstick as well as many new requirements, Sokolove Law needed to implement a mature CRM system from scratch. Crucial to project success would be the ability to leverage out-of-the-box Salesforce capabilities and Salesforce App Exchange partner technology while implementing creatively applied custom code to tie all of the parts together seamlessly. Key highlights of the resulting solution

include:

- A highly automated call center including call scripting based on Salesforce Service Cloud Console and Five9's Cloud Based Call Center.
- Customized case assignment and case qualification scoring mechanisms including compliance with statute of limitations regulations in all 50 states in which Sokolove Law does business.
- A case monitoring mechanism that ensures that all cases are being followed up on in an appropriate manner.
- Integration with DocuSign, Conga, and SendGrid for management and distribution of high volumes of client documents and letters supporting compliance with regulations regarding attorney\client relationships.





LANSDALE GROUP'S SOLUTION *(continued)*

- An integrated partner portal which allows affiliated law firms to collaborate with Sokolove Law on joint cases.
- Optimized data structures and data capture mechanisms supporting Business Intelligence solutions helping Sokolove optimize marketing spend across multiple case types, channels, and time periods.
- Built in flexibility to handle variability in qualification, assignment, and follow up processes across numerous case types.

The project was truly a team effort involving representatives from every area of the business and utilizing both Lansdale and Sokolove technical resources. Through an iterative, prototype centric requirements and design process, Lansdale Group helped Sokolove Law take

their vision for a comprehensive, flexible CRM system to creative and elegant designs and ultimately to a fully implemented system. Lansdale Group also helped ensure a cohesive team effort in such a large project through a 'divide and conquer' component based requirements, design, and configuration\build process. By staffing the project with a small number of Lansdale Group's broadly skilled, deeply experienced senior Salesforce architects rather than a larger team skewed toward more junior specialists, Lansdale Group was able to successfully orchestrate the complexity of integrating the many components that defined all of Sokolove's business processes. The combination of process and team enabled clear visibility into project progress resulting in a successful go live of a large, complex system.

BUSINESS IMPACT

Since implementing Salesforce, Sokolove Law has experienced faster, more reliable performance, and has taken advantage of the ubiquitous Salesforce platform to increase functionality. Uptime for the 24 hour call center has increased exponentially. Operator scripts

and workflows run quickly and smoothly. Flexibility for adding new fields, intake sources, campaigns and case types is night and day, and no longer require developer time. And the ease of integrating 3rd party tools and services has brought their CRM platform to the next level.