



Clearer Insights, Smarter Case Management:

How a Multi-Practice Law Firm Transformed Case
Reporting with Mitrtech CaseCloud™

At-a-Glance Summary:

Real-Time Reporting, Legal-Specific Solutions

A multi-practice consumer law firm that has represented over 50,000 clients and employs a team of over 20 attorneys needed a more efficient way to manage cases and deliver actionable insights across its practice groups.

By adopting **Mitratesh CaseCloud™** (formerly Advologix), the firm streamlined reporting, automated key workflows, and gained a clear, real-time view of firm-wide performance.

The result: significant cost savings, enhanced visibility, and a scalable platform purpose-built for legal operations.

Key outcomes at a glance:

- 30% cost savings on licensing
- Legal-specific workflows automated
- Transparent performance metrics
- Firm-wide adoption across multiple practice areas



With CaseCloud™, we finally have a solution designed for the way law firms operate, not a generic tool we had to force-fit."

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MULTI-PRACTICE CONSUMER LAW FIRM





Breaking the Mold:

Why This Firm Left Its Legacy System

The firm's previous system, a well-known practice management software provider for attorneys, limited its ability to deliver real-time insights. Manual reporting, poor visibility across cases, and workflows misaligned with legal operations created roadblocks to growth and client satisfaction.

Firm leadership recognized the need for a transformative solution that would:

- Centralize matter management and reporting
- Provide matter-centric workflows tailored to law firm operations
- Support firm-wide adoption through intuitive, role-specific features

Their vision required moving beyond traditional CRMs or legacy case-tracking tools.

Why Mitratesh CaseCloud™:

Built on Salesforce. Made for Legal.

1. Designed for Legal Workflows
2. Tailored Expertise, Exceptional Partnership
3. License Efficiency and Cost Savings
4. Salesforce Infrastructure, Simplified for Legal

Designed for Legal Workflows

Mitratesh CaseCloud™ stood out because it was purpose-built for legal teams, offering:

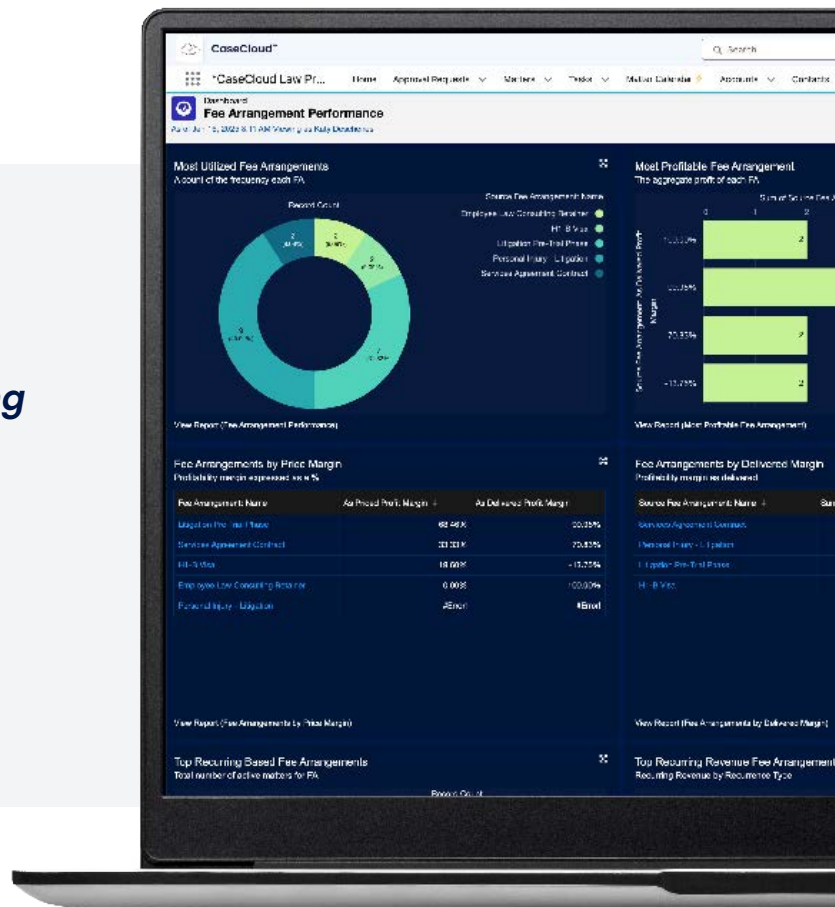
- Activity plans that drive consistency across cases
- Participant roles aligned with legal team structures
- Best-practice templates enabling fast, standardized work
- Not just a software, but a trusted partnership



Mitratesh brought a deep understanding of law firm needs, not just technical expertise. That made all the difference during implementation.”

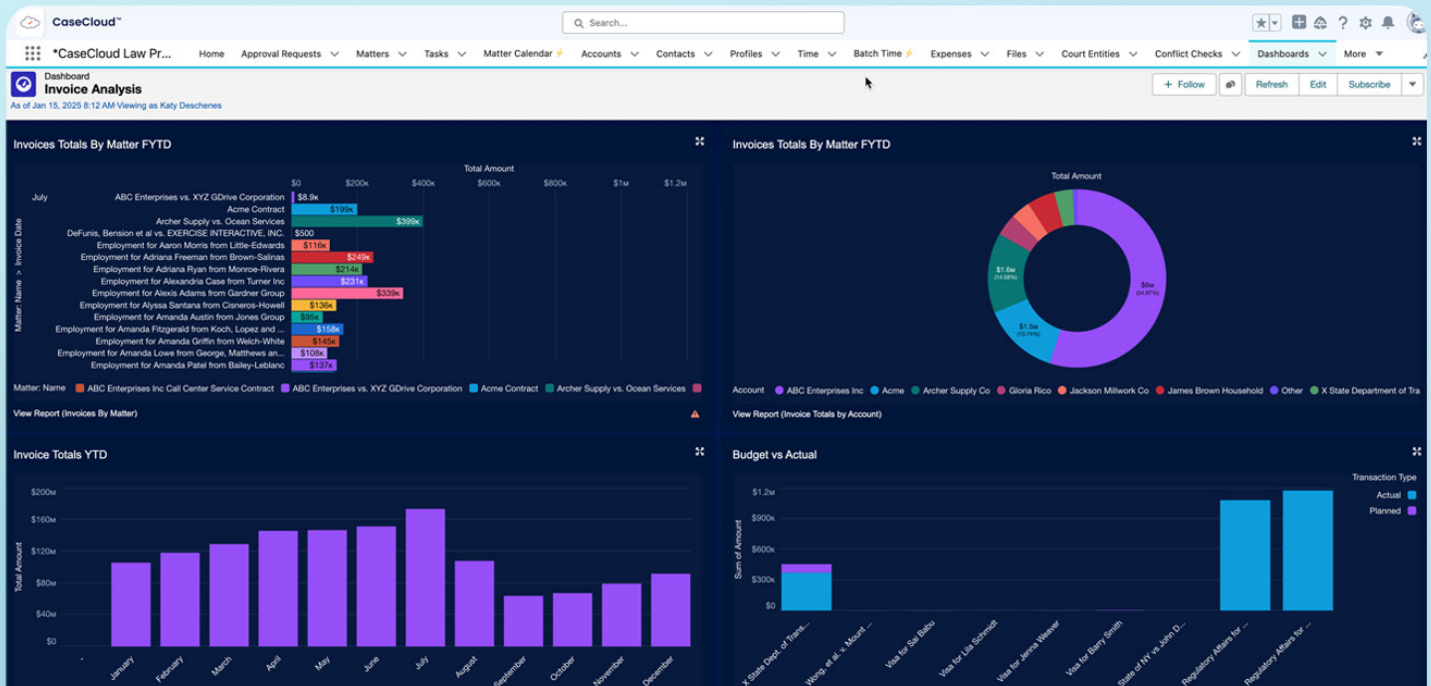
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Tailored Expertise, Exceptional Partnership

Guided by the firm's leadership and Mitratesh's deep legal expertise, the team configured CaseCloud™ for maximum impact — avoiding over-customization while meeting specific business and practice needs.



3

License Efficiency and Cost Savings

By optimizing license types and leveraging CaseCloud™'s capabilities, the firm achieved a **30% reduction in licensing costs** compared to its previous setup.

4

Salesforce Infrastructure, Simplified for Legal

The firm had outgrown its prior legal software provider, which was designed mainly for small firms with limited functionality. They needed a more scalable, enterprise-ready system and turned to Salesforce for a matter and claims solution.

Salesforce provided a strong, highly customizable foundation, but the team quickly realized that its flexibility required additional legal-specific expertise to unlock its full potential. Because Salesforce isn't purpose-built for legal operations, the firm needed a solution layered on top that could deliver the specialized workflows and best-practice processes their team depended on.

CaseCloud™ changed that.



Built on Salesforce's robust foundation, CaseCloud™ stripped away the complexity and delivered:

- Legal-specific functionality
- Scalable architecture
- Embedded legal operations expertise

With Mitrates CaseCloud™, the firm finally gained the power of Salesforce — made simple, intuitive, and purpose-built for legal.

This powerful foundation enables CaseCloud™ users to:

- **Automate routine tasks and collaborate in real time**, improving efficiency and reducing administrative overhead
- **Harness advanced reporting and analytics**, empowering teams to make data-driven decisions with speed and clarity
- **Integrate seamlessly with familiar tools** such as iManage, Google Drive, and Microsoft SharePoint, extending the value of its existing technology investments

With this, the firm now has a platform that grows with them, unlocking new possibilities for innovation and client service.

See why firms like this one trust Mitrates CaseCloud™ to streamline routine tasks and enable real-time collaboration on legal cases.

[**Explore Casecloud™**](#)





As part of our firm-wide initiative to modernize operations, we needed a platform that could support multiple areas of our business. Using Mitratesch CaseCloud™ gave us a legal operations hub that's both powerful and practical."

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Managing the Move:

A Smart, Guided Migration

The transition from the firm's legacy platform to CaseCloud™ was accelerated by Mitratesch's legal-first approach to change management. Teams quickly embraced the platform thanks to:

- Intuitive, role-specific workflows
- Rapid onboarding with minimal disruption
- Built-in integrations supporting secure, end-to-end case management

Firm leadership recognized the need for a transformative solution that would:

- Centralize matter management and reporting
- Provide matter-centric workflows tailored to law firm operations
- Support firm-wide adoption through intuitive, role-specific features

With CaseCloud™, the firm now has the flexibility to expand into Mitratesch's broader ecosystem of solutions, including **immigration compliance**, **workflow automation**, **document generation and assembly**, **I-9 compliance**, and more. This unlocks future-ready capabilities such as case intake, legal project management, and document management as needs evolve.



Discover how CaseCloud™ can become your firm's foundation for smarter case management and firm-wide efficiency.

[Schedule a Demo](#)

Advice to Legal Teams:

Do It the Easy Way, with the Right Partner

This firm's success underscores a critical lesson for legal teams: avoid building from scratch. While Salesforce provides a robust foundation, Mitratesh CaseCloud™ delivers a deep understanding of legal functionality, best practices, and implementation strategy needed to transform operations quickly and effectively.

By focusing on core legal processes rather than platform architecture, firms can reduce risk, increase speed, and achieve measurable results.



Mitratesh didn't only sell us software. They partnered with us to co-create a system that fits our firm.

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The Results: Clearer Insights, Smarter Case Management

Looking ahead, the priorities are clear: deepen insights, drive efficiency, and embrace innovation. CaseCloud™'s legal expertise enables this. Salesforce's foundation supports it. And Mitratesh's partnership makes it achievable — all while empowering the firm to deliver exceptional client service with confidence.

A background image showing a group of business professionals in a meeting, with a woman in the foreground looking at a document and a man behind her looking down. The image is overlaid with a dark blue gradient.

MITRATECH

About Mitratesch

Mitratesch is a proven, global compliance and automation solutions partner for legal, risk, compliance, and HR professionals seeking to maximize productivity, control expense, and mitigate risk by deepening organizational alignment, increasing visibility, and spurring collaboration across an enterprise.

Mitratesch serves over 28,000 organizations worldwide, spanning more than 160 countries.

For more info, please visit: www.mitratesch.com

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