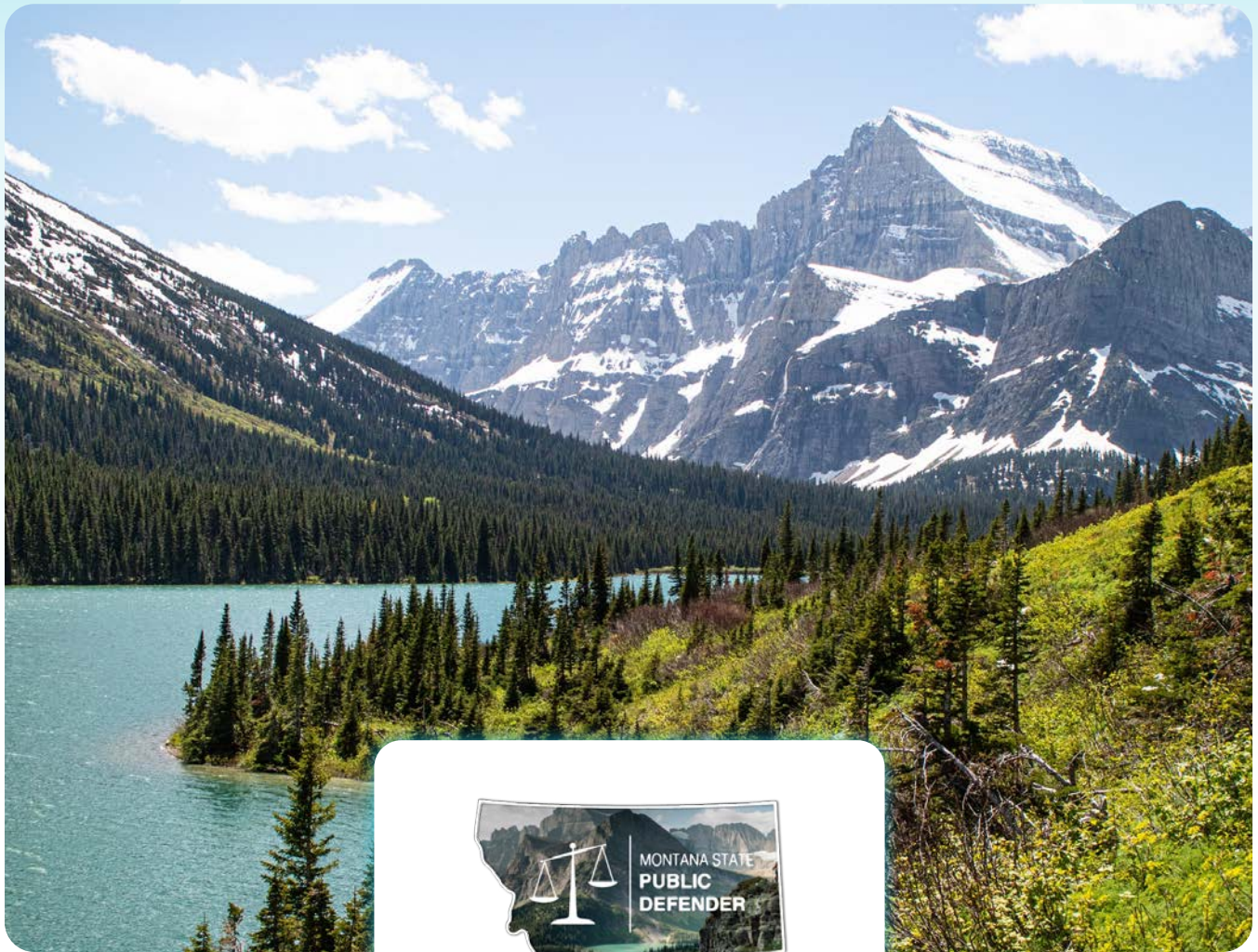




Montana Office of the State Public Defender (OPD) Modernizes Government Case Management with Mitrtech

"In Our Control, Not a Vendor's": Montana OPD's CaseCloud™ Success Story

Customer Snapshot

- **Customer:** Montana Office of the State Public Defender (OPD)
- **Leader/Champion:** Brett Schandelson, Director (former litigator and managing shareholder)
- **Use Cases:** Case & matter management, workload management, spend management, timekeeping, vendor & client portals, analytics & reporting, integrations
- **Tech Foundation:** Salesforce Platform + Mitrates CaseCloud™ (formerly AdvoLogix) — locally branded “AdvoPD”
- **Implementation Partner:** Hike2
- **Go-Live:** August 23, 2021

The Montana Office of the State Public Defender (OPD) provides legal representation to those who cannot afford it, serving communities across the state. At the helm is Brett Schandelson, Director of OPD, a former litigator and managing shareholder who transitioned from private practice after realizing his passion for process improvement and operational strategy. Since joining OPD, Brett has led sweeping modernization efforts, building a DevOps bureau, refactoring legacy data models, and spearheading the adoption of new technology platforms.

“

In the ‘before times’, we had to extract everything to Tableau for any meaningful reporting. There were no real-time reports, no dashboards, and no up-to-date insights available.”

BRETT SCHANDELSON

DIRECTOR
OPD





The Opportunity

By 2020, OPD was struggling with legacy, on-premises databases that lacked the flexibility and reporting capabilities to support a statewide public defense system. Attorneys and staff were bogged down in manual data entry, reporting required specialized expertise, and key functions such as spend management and client communication were fragmented across different systems.

Meanwhile, OPD faced chronic under resourcing and increasing demands for transparency from state leaders. To secure funding and demonstrate staffing needs, the agency needed reliable and actionable data. A formal RFP process set the stage for a unified, cloud-based platform that could modernize operations, meet strict state security requirements, and scale to statewide needs.

“

I didn't want to be in a situation where if one vendor said no, our progress stopped. We needed a platform where no one could tell us 'you can't.'”

BRETT SCHANDELSON

DIRECTOR
OPD



The Solution: Mitratesh CaseCloud™

After a formal RFP process, OPD chose Mitratesh CaseCloud™ (then AdvoLogix) with implementation partner Hike2, launching the new system — nicknamed “AdvoPD” — in August 2021.

What made CaseCloud™ stand out was its Salesforce foundation. Instead of a rigid point solution, OPD gained a configurable environment that it could shape to its needs. **Brett’s small team, most without formal development backgrounds, now completes up to 90% of enhancements in-house using low-code tools.**

“

We do 85–90% of development in-house because it’s configuration, not code.”

BRETT SCHANDELSON

DIRECTOR
OPD

“

Ten minutes into the demo, we realized the platform was in our control, not a vendor’s. That changed everything.”

BRETT SCHANDELSON

DIRECTOR
OPD

Together, OPD, Mitratesh, and Hike2 consolidated two legacy systems into one platform that unifies case and spend management, integrates directly with the state’s accounting system, and powers role-based dashboards for attorneys, managers, and finance staff.

OPD also influenced innovation within CaseCloud™. Their idea for a “Yelp for expert witnesses” evolved into profile management, while their feedback on workload management helped shape flexible activity planning and participant tracking.

Snapshot Summary: Why Mitrates CaseCloud™?



Salesforce-native flexibility:

Low-code automation (now Salesforce Flow) for hundreds to thousands of scheduled, triggered, and screen flows.



A fit-for-legal data model:

A strong core model that OPD could configure, extend, and, where needed, customize.



Unified operations:

Matter + spend in one environment, including a custom daily batch integration to the state payment system.



Portals:

Client and vendor portals to submit bills, communicate with OPD staff, exchange documents, and reduce email/printing.



Role-based experiences:

Profile-specific homepages and dashboards for managers, attorneys, office staff, and finance.





The Results + Looking Forward

The transformation has been profound. With a single source of truth for matters, spend, and operational data, OPD can now answer critical questions in real time. For the first time, the agency can calculate its staffing shortfall — in one recent year, identifying a gap of 44 attorneys' worth of capacity, a data point that has fundamentally changed how OPD advocates for funding.

This clarity has had measurable results: by the end of the current biennium, OPD's appropriation will be nearly double its 2018 base budget, growth Brett directly attributes to the agency's ability to present compelling, data-backed stories.

Internally, new timekeeping tools have delivered **a 38% increase in average hours captured per closed case over three years**. Externally, more than **11,000 clients have accessed OPD's new client portal** — a usage level that was impossible on legacy systems.

Results at a Glance:

44

A headcount shortfall of 44 attorneys identified — now measurable and actionable

93%

~93% budget increase over 2018 base by end of FY 2027 biennium

38%

38% growth in average hours per closed case in three years

11,000+

11,000+ clients have accessed the client portal



Looking ahead, OPD is pushing CaseCloud™ even further. The agency has already been running a production AI tool with Hike2 for nearly a year, and is now exploring agentic data validation that auto-corrects errors in real-time, next-best-step guidance for complex workflows, and invoice quality scoring to strengthen financial controls.

Underlying every initiative is the same principle: **reducing keystrokes, cutting administrative burden, and giving defenders more time with clients.**

“

Short of Salesforce giving up the ship, there's really no one who can tell us 'no.' That flexibility is essential in public defense — we use technology to close resource gaps.”

BRETT SCHANDELSON

DIRECTOR
OPD

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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