ASTRA ADVOKATER GAINS **THE HIGHEST QUALITY OF SERVICE** AND EMPLOYEE EXPERIENCE WITH SALESFORCE
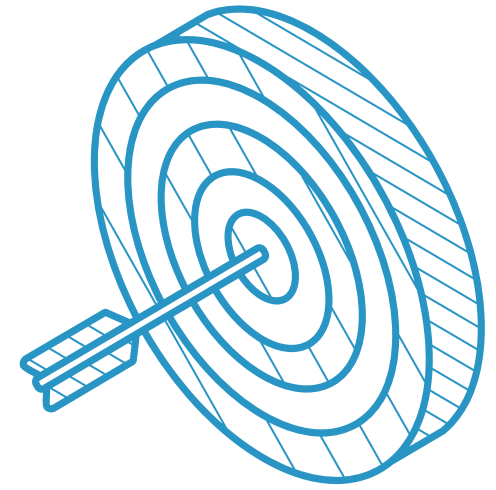
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ASTRA ADVOKATER

Astra Advokater is a law firm founded in 2019.
Over the years, it has served over 300 clients to whom it provides comprehensive advice on business law, litigation, and business processes.

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ASTRA ADVOKATER'S CHALLENGES:

conflict of interest check, that requires counterparty verification, **was performed manually;**

**processes within the company had to be unified.** Partners coming from different backgrounds tend to follow their own processes rather than company standards for various case types;

the previous solution required **a lot of manual work** in the time reporting and approvals area;

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\# the case management system **wasn't fully integrated with Fortnox** (the company's ERP tool) which made the work time-consuming and ineffective;

\# there were **no dashboards to give partners an overview of the most important information** useful in their daily work, case management and decision-making;

\# Astra Advokater had no defined processes in regard to Business Development and Customer Relationship Management. All **Partners worked individually** on generating new business and kept customer data in different tools. There was no common place to store leads or transparency about which partner was working with which potential customers.

PROJECT SCOPE:

\# **Salesforce Service Cloud implementation** with plenty of customizations in the area of case management, time reporting, invoicing, and managing trust accounts;

\# Change Management training;

\# implementation of a **component for reporting the time** spent working on a given case or client.

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**Salesforce integration** with:

> Microsoft's Single Sign-On (SSO);
> MS Outlook – all email communication available at the account level, not in inboxes;
> Scrive – an e-signature system;
> DueDilligence – an application to run the AML/KYC processes;
> Fortnox – an ERP tool. Invoices are created in Salesforce based on the reported time and expenses and sent to Fortnox as ready-made records and PDFs;
> Bisnode – a customer database, updated according to court letter and board members;

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KEY BENEFITS FOR ASTRA:

\# **time saved on administrative tasks** and time reporting can be used for billable work;

\# quick generation and **access to all documents created** and attached to the Case or Clients;

\# more control over Associates' and Students' availability and effectiveness with Case Milestones tracking and time reporting tools;.

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effective accounts receivable collection;

effective reporting that **increased the decision-making quality;**

improved business development processes;

**a 360-degree view of the Case** enhances collaboration.