



NAVE LAW FIRM

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# Case Study: Nave Law Firm



360 SMS Automation and Implementation within  
Salesforce for Nave Law Firm

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## Project Overview

Nave Law Firm sought to enhance their client communication and document management processes by automating SMS notifications for case outcomes, integrating DocuSign for efficient document handling, and managing SMS history updates within Salesforce. The objective was to ensure timely and compliant client interactions, improve operational efficiency, and maintain high standards of client engagement.

## Summary

The primary goal was to automate SMS notifications upon reaching the Closed Won stage for case outcomes, considering both weekend and non-weekend scenarios. Additionally, the integration of DocuSign was essential for efficient document management. The project also aimed to prevent SMS and email notifications based on negative client ratings and ensure prompt client notifications upon case closure.

## Challenges

- **Automation of SMS Notifications:** Implementing an automated system to send SMS notifications based on predefined templates for both weekend and non-weekend cases when opportunities advance to the Closed Won stage.
- **Integration with DocuSign:** Ensuring seamless integration with DocuSign for efficient document management and handling.
- **SMS History Management:** Maintaining an accurate and up-to-date SMS history within Salesforce to ensure all communication records are documented properly.
- **Negative-Rated Triggers Prevention:** Implementing a mechanism to prevent the triggering of SMS and email notifications based on negative client feedback (e.g., ratings below 2.5).
- **Client Notification Upon Case Closure:** Ensuring timely and accurate client notifications upon case closure to enhance client satisfaction and operational efficiency.

## Solutions Implemented

- **Automated SMS Notifications:** Developed an automated system to send SMS notifications using predefined templates ('Won Case – Immediate - Weekend' and 'Won Case – Immediate - Non Weekend'). This automation was triggered when opportunities reached the Closed Won stage, ensuring timely communication based on the case outcome.
- **DocuSign Integration:** Integrated DocuSign within Salesforce to streamline document management processes. This integration enabled efficient handling, signing, and tracking of documents, reducing manual intervention and errors.
- **SMS History Update Process:** Implemented a robust process for updating SMS history within Salesforce. This ensured that all communication records were accurately maintained, providing a comprehensive view of client interactions.
- **Filtering Mechanism for Negative Ratings:** Introduced a filtering mechanism to prevent the triggering of SMS and email notifications based on negative client feedback. For ratings below 2.5, notifications were excluded for the qualified lead owners, preventing negative client experiences from triggering unwanted communications.
- **Client Notification System:** Established a notification system to promptly update clients upon case closure. This system ensured timely handling of notifications and document dispatch, enhancing client satisfaction and engagement.

## Results:

The implementation of these solutions resulted in significant improvements in operational efficiency and client engagement for Nave Law Firm. The automated SMS notifications ensured timely communication with clients, while the DocuSign integration streamlined document management. The accurate SMS history updates provided a reliable record of client interactions, and the filtering mechanism for negative ratings ensured that communications were appropriately managed based on client feedback. Overall, the project enhanced communication compliance and client satisfaction.

## **Conclusion:**

The 360 SMS automation and implementation within Salesforce for Nave Law Firm successfully addressed the challenges of automating SMS notifications, integrating DocuSign, managing SMS history, preventing negative-rated triggers, and notifying clients upon case closure. The solutions implemented resulted in improved operational efficiency, enhanced client engagement, and better communication compliance, ultimately contributing to the firm's success in client management and service delivery.