



NAVE LAW FIRM

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Case Study: Nave Law Firm



DocuSign Integration with Salesforce for Retainer
Document Automation

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Project Overview

Nave Law Firm embarked on a transformative project to enhance their document handling and client communication processes by integrating DocuSign with Salesforce. This initiative aimed to automate the handling of retainer documents, focusing on those exceeding \$500, and streamline the firm's operational efficiency by consolidating multiple retainer formats.

Objectives:

- Integrate new document fields from CLIO into Salesforce.
- Automate the sending of retainer documents via SMS (70%) and email (30%) using DocuSign.
- Consolidate ten retainer formats into five to improve process efficiency.
- Ensure retainers under \$500 are not sent out.

Challenges:

- **Salesforce Field Integration:** The firm needed to add new fields within Salesforce to fully support the integration and automation of document handling. This required meticulous planning and execution within a tight 30-day timeframe.
- **Data Migration:** Transitioning document data from CLIO to Salesforce posed a significant challenge, necessitating a seamless migration process to avoid data loss and ensure continuity.
- **DocuSign Integration:** Incorporating DocuSign into the workflow required configuring the system to send documents via SMS and email. This integration had to support options for both DocuSign-Text and DocuSign-Mail.
- **Automation Implementation:** Automating the document integration and SMS sending processes required robust programming and testing to ensure reliability and timeliness.
- **Retainer Consolidation:** Streamlining ten retainer formats into five necessitated a strategic approach to ensure the new formats met all client needs and complied with legal standards.

Solutions Implemented:

- **Salesforce Enhancements:** Essential fields were added to Salesforce, facilitating comprehensive data management. This enhancement laid the foundation for the subsequent integration and automation processes.
- **Data Migration from CLIO to Salesforce:** The migration process was carefully planned and executed to ensure a smooth transition of existing document data, centralizing information within Salesforce for easier access and management.
- **DocuSign Integration:** DocuSign was integrated into the workflow, with 70% of documents sent via SMS and 30% via email. The "How Client Sign Docs" field was updated to include options for DocuSign-Text and DocuSign-Mail, offering clients flexibility in how they signed documents.
- **Automation Implementation:** Automation was implemented to streamline document processes, ensuring that actions were timely and efficient. This included automating the sending of retainer documents and integrating SMS notifications.
- **Retainer Consolidation:** Ten separate retainer formats were strategically consolidated into five, optimizing administrative efficiency while accommodating varying client needs. This consolidation helped reduce complexity and improve the firm's overall workflow.

Results:

- Improved Efficiency: The integration and automation efforts significantly reduced the time and effort required to handle retainer documents, allowing staff to focus on higher-value tasks.
- Enhanced Client Experience: Clients benefited from the flexibility of signing documents via SMS or email, improving their overall experience with the firm.
- Centralized Data Management: With all document data centralized in Salesforce, the firm achieved better data organization and accessibility.
- Streamlined Processes: The consolidation of retainer formats and the prevention of sending retainers below \$500 optimized the firm's processes, reducing administrative overhead and ensuring compliance with internal policies.

Conclusion:

The successful integration of DocuSign with Salesforce at Nave Law Firm has revolutionized their document handling and client communication processes. By leveraging automation and strategic consolidation, the firm has achieved greater efficiency, enhanced client satisfaction, and streamlined their operations. This project serves as a testament to the power of technology in driving organizational transformation and operational excellence.