

CASE STATUS | CUSTOMER STORY

Five Minutes Here. Ten Minutes There.

How Elrod Pope Law Firm turned Case Status® Case Summary into the highest ROI AI investment on the team. Hour-long deep-dives compressed into seconds, sentiment ready before the phone rings, and a review-saving early warning the firm did not have a year ago.

AT A GLANCE

- Firm:** Elrod Pope Law Firm, Rock Hill, South Carolina
- Practice:** Personal injury, North Carolina and South Carolina
- Case management:** Filevine, integrated with Case Status
- Featured leader:** Ben Leader, Managing Partner
- Spotlight capabilities:** AI-Powered Case Summary

60 min to 5 sec

From hour-long deep dives to a one-glance pulse

100%

Case manager agreement with the overview and sentiment rating

Before the ring

Next steps and context ready before the client picks up

EXECUTIVE SUMMARY

The Highest ROI Job on Ben’s Desk

Ben Leader manages a busy personal injury practice out of Rock Hill, South Carolina, with active cases across North and South Carolina. He has a simple thesis about technology: shave five or ten minutes off a recurring task, multiply it across every case, every staff member, every workday, and the result is real capacity. Case Summary, the Client Intelligence™ AI agent built into Case Status, is one of the jobs where that thesis pays back the fastest.

Before Case Summary, getting a true read on a case meant an hour-long dive through the client touch-points and activity feed to figure out what happened last, where the client stood, and whether things were on track. It involved multiple staff who had to bridge together their various communications. Today Ben can pull a summary, see the sentiment, read the follow-ups, and know the case before the client even picks up the phone.

The team tested it in the most direct way they could: every case manager ran the Summary and sentiment ranking against three to five of their own clients. Not one of them disagreed with what the agent returned. Spot on. And it picks up on tone, which is what makes it useful as a leading indicator for the things that actually move the firm: client retention, NPS, and Google reviews.

The Firm

Elrod Pope handles all types of personal injury matters across two states. Cases are long, message volume is heavy, and every client has a stake in an outcome they cannot control. The firm runs on Filevine, with Case Status layered on top to handle the client experience and the team's visibility into every case.

Ben's operating principle is that minutes compound. A few minutes per case, per day, per staff member becomes hours of capacity per week.

“I’m always going to come back to shaving minutes off this project here or there. Five minutes here, ten minutes there. It really does add up throughout the day.”

Ben Leader, Managing Partner, Elrod Pope Law Firm

The Before State: An Hour-Long Dive Just to Catch Up

On a busy personal injury caseload, leadership visibility is expensive. Before Case Summary, the way Ben got a real pulse on a file was to have the whole team open Filevine and scroll. Activity feed, recent notes, last call, last message, last appointment. Staff would bring all their information to a staff meeting. It took an hour, sometimes more, just to know where things stood on a single case.

The firm tried to bridge the visibility gap with monthly case meetings: injuries, medical expenses, insurance coverage, time on desk. The checklist was right. The cadence was wrong. A monthly meeting cannot tell you that a client is dipping today.

“This tool is a really strong feature for managers and owners, to be able to keep a true pulse on each particular case without taking an hour-long dive into a Filevine activity feed.”

Ben Leader, Attorney, Elrod Pope Law Firm

Case Summary: A Bird’s Eye View, On Demand

Case Summary pulls the case together in one view and with one click: client and legal staff, case ID and key timing, appointments already on the books, Net Promoter Score and message-level sentiment, follow-up items, open questions, documentation, and tasks. The same data the team already trusts inside Case Status, surfaced in one place and refreshed on demand.

It also shows up wherever the team works. The Case Status browser extension puts Case Summary into the same window as Filevine, the inbox, and any other tab a case manager has open. One pane of glass, without forcing anyone to switch tools.

What lives inside a Case Summary

- Client and legal staff. Case ID and timing. Appointments already in place.
- Sentiment ranking and the latest NPS read on the client.
- Follow-up items, open questions, documentation needs, and tasks.
- A timestamp on the last refresh, so the team knows whether to regenerate.

The Sentiment Test

The hardest claim to defend in any AI rollout is that the model is right often enough to act on. Elrod Pope tested it the way a litigator would. Each case manager picked three to five of their own clients, ran the summary, and compared the AI sentiment ranking against their own read.

Every case manager came back with the same answer: the AI got it right. Tone included.

“We had each of our case managers test this out with three to five clients. Not a single one of them came back to me and disagreed with the sentiment rating that was ultimately assigned. It is spot on, and it picks up on tone. It really nails the overall posture in the case.”

Ben Leader, Managing Partner, Elrod Pope Law Firm

What that unlocks is speed. Ben can be on a call before the client picks up, with the sentiment ranking already on screen. He walks in knowing where the relationship stands, not guessing.

“I can literally be on the phone with somebody, and before they even answered the ring, I’ve pulled up the summary feature and gotten a sentiment ranking on how they’re feeling about their case.”

Ben Leader, Managing Partner, Elrod Pope Law Firm

Air Cover for the Team

Sentiment scoring is a tool for clients, but it is also a tool for leadership. When a client is frustrated about something the firm cannot control, like the property damage situation on the other side of an auto claim, Ben needs to know whether the issue is something the team can fix or something the team is already handling well.

Case Summary draws that distinction explicitly. In one of the messages Ben reviewed, the Client Intelligence Agent noted that the client gave a four out of five and called out a specific staff member by name for going above and beyond. That is leadership intelligence the firm did not have before.

“The AI actually takes up for them. It says this client received a four out of five and Hunter has been extremely responsive and going above and beyond. So you can really get clear ideas of, is this an us problem, or is this just the situation we’re dealing with?”

Ben Leader, Attorney, Elrod Pope Law Firm

Proactive, Not Reactive

Personal injury firms live and die by reviews. A one-star Google review lands in public, and the response is always too late. The economics of Case Summary, in Ben’s framing, come from getting in front of those moments rather than reacting to them.

Sentiment shifts before a review does. A client who drops from a five to a two is signaling something the firm can act on, with a phone call, a personal check-in, a status update. Ben’s team is set up to catch that drop now, in real time, instead of finding out about it from Google.

“The sentiment probably comes through long before a bad review does. Instead of waiting on a one-star review to come in and having to react to it, we notice somebody dipping a little bit and pick up the phone and call them. Those types of things go such a long way.”

Ben Leader, Attorney, Elrod Pope Law Firm

What Became Possible

Ben describes the operational outcomes in plain leadership terms.

The hour-long deep-dive, compressed.

What used to require scrolling through an activity feed now arrives as a summary. Ben pulls a case in seconds, on his desktop or in the browser extension, and walks into the next conversation already current.

Sentiment that holds up under scrutiny.

Every case manager validated the AI sentiment ranking against their own clients. Every one of them agreed with the result. Spot on, including tone.

Case manager parity with attorney visibility.

Elrod Pope built around full visibility. Case Summary gives the case manager, the paralegal, and the attorney the same picture of every case, without one of them having to recap it for the others.

Air cover for staff doing great work.

The AI calls out staff by name when clients give credit. Leadership sees the difference between an us problem and a situational frustration before drawing the wrong conclusion.

An early warning system for reviews.

Sentiment dips show up in time to do something about them. The firm gets to a phone call before a one-star review gets to Google, which protects both the relationship and the firm’s reputation.

A continuous pulse, not a monthly meeting.

The bird’s eye view that used to take a monthly case meeting now lives in every Case Summary. Injuries, medicals, coverage, time on desk, plus the new layer monthly meetings never had: client sentiment.

Closing

The case for Case Summary at Elrod Pope is a leadership case before it is a technology case. Ben’s thesis is that minutes compound, that visibility multiplies, and that the firms that win are the ones that see things first. Case Summary is how his team sees things first now.

The investment is AI-heavy. The return is not. It is measured in fewer Filevine deep-dives, fewer surprise reviews, and fewer cases that slip past leadership before someone can do something about them.

“Being able to be proactive versus reactive. Noticing somebody dipping a little bit, picking up the phone and calling them. Those types of things go such a long way, and we can get ahead of them using these features.”

Ben Leader, Managing Partner, Elrod Pope Law Firm

Elrod Pope Law Firm

Excellence in Client Satisfaction



Ben Leader - Partner



91%

Client Engagement on the App

6

Hour Response Time (vs 48 hour industry avg)

9.4

Average Feedback Rating on scale of 0-10

80

Net Promoter Score (vs 30 of industry)

1000+

Staff hours saved in just 8 months!