

# Serving Hundreds. Answering Everyone.

How Shawn Taylor Law uses Case Status<sup>®</sup> and AI to run a high-volume Social Security Disability practice, serving clients nationwide, and closing every workday at 4 p.m.

## AT A GLANCE

**Firm:** Shawn Taylor Law, Charleston, West Virginia

**Practice:** Social Security Disability (regional Appalachian practice, now national)

**Case management:** NEOS by Assembly (formerly Needles), integrated with Case Status

**Team size:** 5

**Active caseload:** Hundreds of open cases, touched daily by the attorney

**Attorney tenure:** 33 years

## EXECUTIVE SUMMARY

### A Single System for a Practice That Cannot Miss

Shawn Taylor has been practicing law for thirty-three years. His firm, headquartered in Charleston, West Virginia, is one of the busiest Social Security Disability practices in the Appalachian region with active cases across West Virginia, Kentucky, Ohio, and Virginia, and, increasingly, the rest of the country. Texas, Oregon, New York, and Miami are routine. A full schedule of daily disability hearings is routine. So is the volume: hundreds of active cases managed by a team of five.

Before Case Status, each of those cases lived across three parallel streams of communication: email, phone, and text. Regardless of channel, the same questions always arrive through all three. Staff fielded calls while answers sat in inboxes they could not reach. Attorneys spent their day reconciling messages instead of practicing law. In Shawn's words, "it was unruly. It was really not manageable."

Today, Shawn's firm runs on Case Status. Clients are routed by design into a single client experience that integrates with the firm's case management system. Message urgency scoring tells Shawn which of hundreds of inbound messages to read first. AI-drafted responses land in the right tenor nine times out of ten. Bulk messaging reaches every open case in seconds. Re-engagement campaigns close

adoption gaps in under ten seconds of attorney effort.

The story is not a technology story. It is an operational one. One attorney, with a team of five, touches every one of hundreds of active cases every day and still walks away at 4 p.m.

## The Firm

Shawn Taylor built his practice around a principle he returns to often: every case is critical. “Any of us that have had a long history of practicing law, every case is critical,” he says. “It’s critical to the client. There is a sense of urgency and need with every client. And client communication is critical.”

He backs that principle with research. The most common criticism lawyers receive from state bars, Shawn notes, is not about the quality of their work. It is that clients do not hear from their attorney. Or, if they do, the answers are late or unsatisfying. Closing that gap was always the goal. The question was how.

The firm operates in a uniquely demanding segment. Social Security Disability cases move slowly; the wait for a hearing can stretch two years. Clients are often in financial and physical distress. Daily message traffic is heavier than in most practices, and every unanswered question risks both the case and the client relationship. When the practice grew beyond what phone, email, and text could absorb, Shawn needed a system, not another tool.

## The Before State: Three Streams, One Question

Before Case Status, a single client inquiry traveled three different paths to the firm. A client with a routine question, “What’s going on in my case?” would send an email. If an answer did not arrive within an hour, the client would follow up with a phone call. The call would go to voicemail, because staff were already on other calls. A text message would follow shortly after.

By the time the attorney or paralegal saw any of it, three parallel threads of the same question were in motion. Internal back-channel messages added a fourth layer: “Did you get this? Have you answered? Do you know the answer?” Skilled staff spent their day reconciling message streams instead of advancing cases.

*“It was unruly. It was really not manageable.”*

Shawn Taylor, Attorney and Founder

## The Consolidation: One System, One Source of Truth

Case Status gave Shawn a structural answer: route every client touchpoint through a single client experience toolset that sits inside the firm's case management system. No more personal email addresses for clients. No more direct-dial numbers to individual desks. Every inquiry now arrives in one place, tied to the case, visible to the team, and answered once.

The operational benefit is immediate. When a client calls expecting an instant answer, the firm rarely has one at the ready; the attorney or paralegal needs to pull up the file and review the posture of the case before responding competently. Case Status builds that buffer of time in, by design. Clients receive confirmation their message is being worked; staff return with an accurate, timely answer instead of a rushed or incorrect one.

The App also gives every client in a regional, and now national, practice the same experience. A client in Oregon or Miami gets the same quality of communication as the client across the street in Charleston.

*"We no longer provide email addresses to our clients. We no longer provide direct-dial telephone numbers."*

Shawn Taylor, Attorney and Founder

## The AI Unlock: What This Does to an Attorney's Day

Consolidation solved the inbound problem. AI solved the outbound one.

When a message arrives in Case Status, the platform reads the case context and drafts a response. Shawn reviews the draft before it goes out and nine times out of ten, he sends it as written.

*"The AI presented right in the message editor has been remarkable. I hit the AI-powered response to every question and review it to see if it is appropriate. Nine times out of ten, it is a very good response; it's one that I will use because it is correct. It's also written in a tenor that's appropriate for the client."*

Shawn Taylor, Attorney and Founder

That quote captures the ROI case. For a practice managing hundreds of active cases with a team of five, the unit of optimization is the team's time: minutes, hours and days. AI does not replace Shawn's or the team's judgment as they review every draft. It eliminates the first-draft burden which is where we spend most of the time in message response. The work left for the human is review, not writing.

The compounding effect is what matters at the leadership level. When the cost of answering a client drops from minutes to seconds, the calculus of how many cases one firm can carry changes. The ceiling on a high-volume practice is no longer communication capacity. It is case quality.

### Why “tenor” matters

Shawn’s point about tenor is easy to miss and hard to overstate. Social Security Disability clients are often frustrated, anxious, and in pain. A reply that is factually correct but tonally off can damage the relationship.

Case Status’s Client Intelligence powered drafts in the voice of an empathetic practice, acknowledging the client, providing the answer, and pointing them to the right next step. A client messaging about a painful shoulder receives, verbatim from Shawn: “We’re sorry to hear that. Please notify your primary care physician or your specialist.”

The draft is kind. It is correct. And it arrives in seconds.

## Workflow in Practice

The platform’s value compounds when Shawn uses its operational features together. Three recent moments illustrate the range.

### 01 Message urgency: a practice run from a triage queue

This spring, Shawn’s twin daughters were graduating from college on the same day. Shawn used Case Status to send a bulk message to every open case that he would be out of the office, staff would be working remotely, and all inquiries would still be answered via the App.

When he returned, he opened the message urgency filter and began with messages scored 4 and 5 (high and critical). “I’m going to depend upon this software that I’ve invested in as a consumer, as a lawyer, and let it help me determine which ones seem to be or are graded out as being the most critical. That’s where I started, and I worked my way through those messages first.”

Once the urgent messages were handled, he sorted the remainder chronologically (oldest first) so the clients who had been waiting longest received the next response. This is not a productivity hack. It is a triage protocol. In a practice of hundreds of open cases, attorney attention is the scarcest resource. Case Status tells Shawn where to point it. The triage idea isn’t just for messages. It is also applied to the higher level: the case. Teams like Shawn’s can start and end each day looking at the “red, yellow and green” of all cases to see which ones are on track, and which need some assistance to get back on track.

## 02 Bulk messaging and re-engagement: one-to-many in seconds

Shawn's graduation-day note was a bulk message. So is his standing re-engagement play: "I always want to try to recreate or re-engage these clients to come to me through this App rather than calling me or emailing me or texting me."

During our conversation, Shawn opened Case Status on a second monitor, navigated to Client Interactions, filtered for "Has not used the app," and surfaced seventy-two clients, roughly six to seven percent of his open cases, who had not yet downloaded the app. A pre-built template reminded them it was never too late. He sent it in under ten seconds.

## 03 On-demand documents: a child support hearing in thirty seconds

Minutes before our interview with Shawn, he received a message from a client whose child support hearing was one hour away. The client needed a document proving a Social Security Disability claim was pending (evidence for the family court judge of why support payments were in arrears).

Shawn attached a PDF (a government document provided by the Social Security Administration) and sent it through Case Status. The client had what they needed in under thirty seconds. "The response was, 'Oh, wow, thanks,'" Shawn recalls. "Could we have done that otherwise? A year ago, two years ago, it would have been a lot more difficult."

# What Became Possible

Shawn did not adopt Case Status to chase client satisfaction scores. "That was not something I ever thought about," he says. "I was looking for it from our ability to reduce the load on myself and on the staff and what really is the primary benefit and delivery is higher client satisfaction."

The operational outcomes he describes are the ones that matter to firm leadership:

### **Capacity without headcount.**

With hundreds of active cases, Shawn's team of five touches every one of them every day, alongside a full schedule of daily disability hearings and personal phone calls to clients who want to hear his voice.

### **Attorney time, restored.**

Shawn's workday runs from 7:30 a.m. to 4 p.m. "I walk away. We are not an emergency room. Courts are closed. We'll talk to you tomorrow. We set that boundary, and Case Status helps us set that boundary."

### **Missed appointments, down dramatically.**

Automated reminders for consultative examinations (two days out and two hours out) have driven no-show rates “down dramatically.” Clients also confirm attendance (“Yes, I will be attending”), closing the feedback loop.

### **The 80/20 rule, managed.**

“Twenty percent of your clients are eighty percent of your messages.” Case Status’s AI drafts polite, empathetic responses to the daily check-ins: “my shoulder hurts,” “I changed prescriptions.” Responding to these small touch-points would otherwise consume hours of paralegal time.

## **Closing**

There is an instinct, in technology sales, to oversell the automation. Shawn Taylor’s story argues the opposite. The platform earns its place by giving a seasoned attorney more leverage, more visibility, and more time. It does not replace his judgment. It does not impersonate his practice. It lets him spend thirty-three years of experience where it matters most: on cases and clients, not on keeping up.

For a firm that settles hundreds of cases a year in a segment where the work itself takes two years to complete, the right question is not “can an App-portal help?” The right question is “can we keep growing without it?” At Shawn Taylor Law, the answer is already in the numbers: hundreds of active cases, a team of five, a 4 p.m. close, and a workday that ends with the attorney caught up not buried.

***“I didn’t adopt this platform to get high scores. I was looking for it from our ability to reduce the load on myself and on the staff. And the primary benefit and delivery is higher client satisfaction.”***

Shawn Taylor, Attorney and Founder