case status ✚ MARC WHITEHEAD & ASSOCIATES
ATTORNEYS AT LAW, LLP

TECHNOLOGY CHANGE MANAGEMENT MADE EASY

Learn how Marc Whitehead & Associates Partnered with the Right Tech & the Right People

Marc Whitehead & Associates know that people who are injured or can no longer work due to a disabling condition are facing the toughest time of their lives. Marc Whitehead & Associates are client centered and committed to taking care of everything for them and removing the burden of the process.

Company Size
30+ Full Time Staff

Location & Primary Practice Area
Texas, Mass Tort & Personal Injury

Client Management System
Litify

"What sets apart the Case Status team is the knowledge. My Project Manager was great keeping the north star on track. Our optimization consultant brought the knowledge and held our hand through the launch, taking a personal interest in our success. And, you know, all big IT projects like these have bumps. But even those were resolved quickly and addressed by our executive sponsor proactively. I've worked with big tech names in deploying technology and the Case Status team was top of the list."

-Diana Singson, Esq. (COO)

THE SITUATION

Marc Whitehead & Associates, like many firms, had a list of growing pains and challenges they needed to address as they came to the end of the year. Operational efficiency was at the top of the list. The reactive nature of responding to client inquiries, calls and emails took time away from core efforts and their clients waiting longer than desired for answers and updates. As such, the firm wanted a win-win: a way to improve the staff productivity while at the same time driving up client satisfaction, to enable more reviews and referrals. But that is just part of the story. There were other Finance and IT prioritization challenges; the firm was facing changes to banking relationships and the medical record system. How could the team address all these challenges in parallel and how could they find a partner that embodied the same core, client-centered philosophies they know are so important?

THE SOLUTION - CASE STATUS

As they evaluated solutions to the staff efficiency and client satisfaction challenges, Marc Whitehead & Associates gravitated toward client portal solutions. They realized the need for a full platform that tied into their back-office operation. They found the perfect partner in the Case Status team. First and foremost, the technology hit the high marks on what the clients would prefer: engagement and communications consolidated on the client's smartphone via a 5-star app. The platform would also integrate into the case management solution running on the firm's Litify system. But equally important as the technology and platform were the people in the process. From interest to consideration to purchase to onboarding to implementation, Marc Whitehead found the team of experts needed for each step of the process.
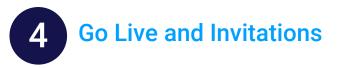
THE RESULTS

1 Consultative Purchasing

This was not a sales process, it was an education process founded on outcomes and Return on Investment. "From our first meetings, the team was always focused on the core problems we were solving for and how they could design the right fit to be a solution - measurable and specific. We know what success should look like so we have our grading system ready and in place."

2 Hand-off

The Account Team that led the purchasing decision carried forward the information to the Success Team. Initiated by a Kick-off call, business objectives were reaffirmed, the process was reviewed, and the roles & the timelines outlined.

3 Implementation & Onboarding

The implementation team not only managed the project, but brought the expertise and the executive sponsorship. Using a published best practice guide and scorecard of key performance indicators, the phases to build toward outcomes was visible and intuitive.

4 Go Live and Invitations

Regular cadences built toward the key moment when the firm invited clients to the platform. As a key moment, this was when the team shined going above and beyond other teams with bigger names to deliver the best client results.

5 Ongoing Optimization & Training

The team remains engaged and focus on a true scorecard of success

OVERVIEW OF CASE STATUS

Case Status is an all-in-one information hub that transforms the way law firms interact with their clients. It gives your firm the ability to update all of your clients with a single click. Centralize your firm communication across multiple attorneys, case managers, and clients. We reduce your time managing clients, so you can focus on being a lawyer.