Filevine

Case Study

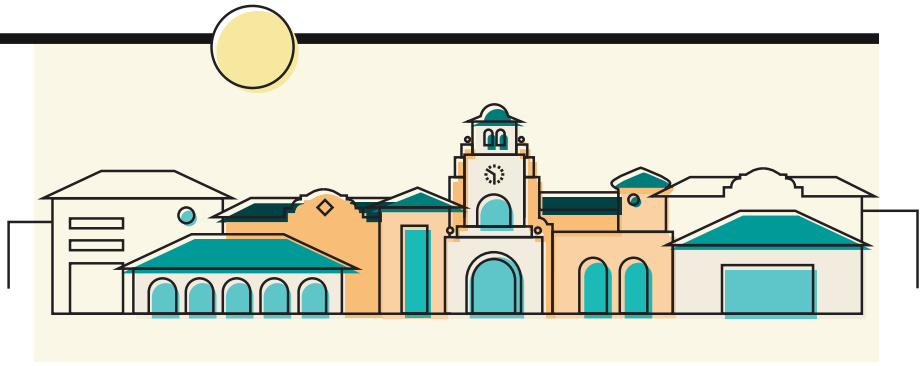
Doubling case value and tripling gross income with Filevine

How smart case management allowed one firm to dramatically improve their financial well-being

THE SARGENT FIRM
INJURY LAWYERS

Year Founded: 2009
Location: Southern California
Practice Areas: Personal Injury
sargentlaw.com

Ryan Sargent is the founder and owner of The Sargent Firm, a plaintiff-side personal injury firm with 5 offices across southern California.



The Challenge

How can law firms grow while improving case quality — and also boosting client satisfaction?

The Sargent firm is a team of personal injury attorneys practicing in multiple southern California locations. They have a reputation for great results and even better client satisfaction.

As a tech-savvy lawyer, Ryan Sargent has demoed nearly every case management platform available. He chose Filevine because it allows him not only to be more efficient, but to provide more timely and personable service to his clients. This has resulted in a dramatic improvement in caseloads, revenue, and case quality.

Increased average lawyer fee per case, from $4.5k to $10k, **a growth of 122%**

Tripled caseloads and gross income

Increased the size of the legal team and their geographic reach

6 steps to leverage client communication for growth:

> The biggest complaint clients have about personal injury attorneys is that they don't communicate. That's why we made communication the center of our practice."

The Sargent Firm has centered their practice on high-quality, frequent client communication. Not only does this lead to better client satisfaction, it is also directly linked to a jump in case quality and increased revenue. These are the steps they follow:

1. **Implement a firm-wide schedule of client communication.** Clarify staff members' roles in client outreach.
2. **Adjust communication by case phase.** The Sargent Firm increases client check-ins to once every 2 weeks during the treating phase. This is when clients are receiving medical care for their injuries. The firm follows medical appointments closely, ensuring their clients receive the care they need. Without this follow-up, many injured people miss appointments or let their care fall through the cracks. But with a consistent outside advocate, their clients not only receive more thorough medical care, they also get better documentation of their injuries and increase case strength and value.
3. **Build communication cadences into the case management system.** Filevine's task flows and deadline chains allow users to program in their preferred communication cadence. Follow-up communication tasks automatically appear on the day's task list for the appropriate staff member.
4. **Keep case files centralized and up to date.** Because all case information is centralized in Filevine, staff members understand the full context of each case when communicating with clients. They can share details and answer follow-up questions without needing to interrupt lawyers or paralegals to ask questions.
5. **Text from the case file.** "Clients ignore emails and don't answer their phones. They want to text us," explains Ryan Sargent. Filevine allows them to text to and from the case file, so their clients get the communication they want.
6. **Analyze data to understand the value of your initiatives.** The Sargent Firm rigorously tracks their key performance indicators. This helps them understand the return on investment for different campaigns, from marketing initiatives to workflow changes.

One decision to future-proof your firm

> When you're using a case management system, you're entering into a partnership with that business. If they don't regularly update, your firm is falling behind. It's reassuring to know Filevine is continually holding up their end of the bargain, staying on the cutting edge and at the forefront with the software that they're providing."

Ryan Sargent uses many of the advanced capabilities of Filevine. But he also recommends it for those firms who aren't as comfortable with technology.

> I recommend Filevine for everyone. When I know an attorney is uncomfortable with technology, Filevine is really easy to use and can give them the simplicity they want. But also, if you have sophisticated needs, Filevine is the most versatile and advanced system. It will match whatever your level of commitment is."

> I've been practicing for ten years. I've demoed every single case management system out there. Filevine's system is better organized than any of them."

See how Filevine can help your firm grow with a free demonstration.
Call us at 801-657-5228.

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