LEADDOCKET by FILEVINE

Case Study

Connecticut Trial Firm

How Filevine Helped a Personal Injury Law Firm Triple Their Practice



Connecticut TRIAL FIRM, LLC

Year Founded: 2016

Location: Connecticut

Number of Staff: 10

Practice Area: Personal Injury

Solutions: Lead Docket, Filevine, Docs+

https://cttrialfirm.com/

Connecticut Trial Firm, LLC is a small personal injury firm that focuses on connecting deeply with clients and "arguing stories, not just facts." From their home base in Glastonbury, CT, their attorneys offer services around a variety of plaintiff-side needs, with a strong focus on single-event personal injury.

A year ago, Connecticut Trial Firm switched to Filevine to manage their practice. Since then, they have seen unprecedented growth. Managing partner Ryan McKeen explains how.

The Need for Efficiency Brought Them to Filevine

Before finding Filevine, McKeen's law firm was using a mix of Dropbox and Clio to manage cases. "I remember having a lot of frustration with Clio and thinking 'This really isn't for injury firms,'" he says. Although Clio claims it's useful across practice areas, McKeen felt the developers didn't truly understand the needs and the daily workflows of personal injury attorneys.

In contrast, he believes the designers of Filevine "understand my practice on a granular level. They've dealt with the exact same issues that we deal

Named the 10th **fastest growing firm** in the country by Law Firm 500

Expanded personnel 7x and still growing

Native **Lead Docket** and **Filevine** users

with on a daily basis." He believes programmers at a generic technology firm couldn't ever attain this specificity. Filevine's intuitive, helpful design comes from actual legal expertise.

McKeen says "the ease of setting up new tabs, the texting, the organization of the file itself, the automatic calculation of medical records and lien numbers, the ability to automate, and of course the reporting features—they are just light years ahead of everyone else!"

Looking back on the time before Filevine, McKeen says "we were probably 5% as organized then as we are today, just over a year later. It's remarkable."

Increased Efficiency Creates Rapid Growth

For McKeen's firm, the right case management system was the key that unlocked rapid growth. In the year that they've used Filevine, their caseload has tripled.

Before Filevine, McKeen says any growth would have made members "worry they don't know where their files are, or feel like they're constantly putting out fires." But Filevine's intuitive interface has made even rapid growth sustainable. It's also allowed them to bring on three new full-time employees this year.

And Filevine has allowed them to reward those employees more lucratively. "Filevine allows us to offer benefits to our employees that we otherwise couldn't," says McKeen. He sees this improve the quality of life for staff and their families, as they can now do things like "attend school assemblies and be present in the lives of their children."

Even with all staff members at full capacity, McKeen estimates the firm would need at least two additional full-time employees just to do the work Filevine handles.

McKeen estimates the monetary value brought in by Filevine to be an 11x return on their investment and "likely much more than that when you factor in client satisfaction."

McKeen says Filevine was a "game changer." When asked what revolutionized his practice, he points to three features: the user interface, advanced reporting, and improved communication through texting.

Game Changer #1: The User Interface

> When people ask me, 'What is the best feature of Filevine?' I answer that Filevine has a lot of great features, but the very best is the user interface."

Compared to other options on the market, McKeen is blown away by "how easy it is to input data into Filevine, organize data in Filevine, and see what's been done on files." Filevine keeps each team member oriented and working together, as the user interface organizes and automates their workflows.

McKeen gives an example of how this helps the firm. Recently they hired a new pre-litigation paralegal. During a case status meeting, McKeen quickly pulled up an active case report. "We can go one by one down the list, and see immediately what needs to be done next," he says. "That wouldn't have been possible before Filevine. But now we've got all the emails in one place, all the text messages in one place, all the data in one place. We've got all our tasks in one place, and that's real efficiency."

Game Changer #2: Advanced Reporting

Connectical Trial Firm also benefits greatly from Filevine's advanced reports to keep them on track and guide their management decisions.

> When I was first a solo practitioner, I had about 16 cases. So I had all of the phone numbers in my cell phone and the relevant dates in my head. I knew the facts of every case intimately. However, with growth, that method quickly became untenable."

"When you start growing an actual firm and an actual case load, you can't remember all of the different things that one needs to know," he says. So he relies on case management technology. With the last year's rapid growth, data analysis has become even more crucial.

Some of the reports his firm relies on are fairly straightforward. McKeen's team runs reports on their leads category, to ensure they follow up quickly with potential clients. They run reports to track statutes of limitations. Reports tell them who needs discharge letters. And the firm also runs a report called the 'Naughty List,' composed of cases that haven't been touched in the previous 30 days. Any case that makes the Naughty List receives a follow-up task to ensure it's moving forward and no client feels neglected.

But Filevine also supports more complex reports to make financial decisions out of massive amounts of data. "As we're growing," says McKeen, "we need to project what our needs are and where we should be spending. It's really useful to have a solid forecast on how much is going to be coming in as opposed to just guessing."

McKeen says advanced reporting also helps them track productivity measures across the firm and with individual team members. This allows them to see where high performance is happening and where they have a bottleneck.

Game Changer #3: Client Texting

> All our clients, ages 15 to 80, love to text. The days of playing voicemail tag are over."

Filevine allows clients to text directly into their case file. Legal team members can also text clients from the case file. This feature allows attorneys to communicate efficiently and in a way clients prefer—without giving out their personal cell phone number. It also ensures that communication through text is securely archived in the case file, where legal team members can access it.

Attorneys also use this feature to quickly gather information: clients can text photos of their injuries or accidents directly into their file.

McKeen explains how this feature has led to a better workflow in his office. When a client tells him she's got a doctor's appointment next Wednesday, they schedule a task for the paralegal to follow up with them directly afterward. The paralegal gets that reminder on Wednesday, sends a text, and immediately hears back from the client about other referrals or diagnoses.

With Filevine organizing the workflow, "we're able to know about our clients right away instead of waiting for months, having a client meeting, and finding out after the fact where they've been," says McKeen. "It allows us to stay on top of our cases in a way we were not able to do before."

Becoming a Law Firm Designer

Though his firm has been using this case management solution for a year, McKeen is still discovering new uses for Filevine. He's part of a legal tech discussion group, where Filevine users explore new features and practices to improve their practice.

That's because Ryan McKeen isn't simply a successful attorney: he's also a law firm designer. Filevine is the tool that has finally enabled him to design maximum productivity and efficiency into his firm.
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See how Filevine can help your firm grow with a free demonstration.
Call us at 801-657-5228.

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