Filevine

Case Study

Providing elite client service while scaling in a regulated industry

How Elevate Baby streamlines work to improve donor and intended parent experience with Filevine

ELEVATE

EGG DONORS · SURROGATES

Year Founded: 2005
Location: Beverly Hills, CA
Solutions: Filevine, Vinesign, Lead Docket, Fax, Docs+

elevatebaby.com

Elevate Baby strives to create joyful IVF experiences. Whether their clients are looking for an egg donor, surrogate, or both, Elevate serves as a guide throughout the entire process with concierge-level service.



The Challenge

As an elite donor and surrogacy agency, Elevate is hyper-focused on client experience. Clients seek expertise from Elevate to guide one of the biggest changes in their lives. But as their business grew, they needed a solution to uphold their personalized service model while maintaining compliance with regulatory policies like HIPAA.

Pain Points

1 **Siloed case management** was an issue because most client information lived with a single team member

2 **Unorganized leads** were a pain point because staff members spent hours sorting through information

3 **Manually creating client forms** and contracts was a concern because Elevate needed a way to move quickly yet still maintain HIPAA compliance

Results

> As an owner, Filevine has given me total oversight into the entire workings of my company. During a time where we are all working remote, it has kept our productivity at an all-time high."

Unified and centralized case management

Before Filevine, Elevate struggled with internal knowledge sharing because most client information lived solely with the intake lead or case manager. "Each employee can easily access all the information on any case. This is particularly important in our industry where different clients may be using the same donor or if egg donor clients now need a surrogate. **Cross-referencing client information has never been easier.**" For the first time, Elevate can transfer clients mid-case to a new owner because all information and communication is accessible in a central location.



Staff efficiency
up **30%**

Efficient lead processing and follow-up

With several hundred leads to process each week, Elevate had slow communication and a long conversion timeline. Lead Docket and Filevine have helped them organize leads, automate processes, and simplify follow-up to convert leads quicker. Elevate shares "within the first week of using Lead Docket and Filevine we saw a significant increase in communication with leads as well as an uptick in overall client signups."

100% increase
in lead conversions



Optimized document collection

Working in assisted reproduction, Elevate needed a solution that was convenient and HIPAA compliant. Filevine allows Elevate to quickly generate common documents with a click and maintains compliance with e-signature and faxing capabilities. "DocGens has been an enormous time-saver for us," Elevate explains.

Game Changers

> Filevine provides a fail-safe workspace. It has allowed us to maintain our quality of service while significantly increasing our client volume without having to hire additional employees."

1. **Lead Docket** Helps Elevate organize their incoming leads and optimize ad spend
2. **DocGen** Enables Elevate to streamline documents and easily send out forms with the click of a button
3. **Vinesign** Allows clients to e-sign compliance forms through text or email

Reflection

As a platform, Filevine is a full-service solution for Elevate. Additionally, it is set to scale with the business.

> We wanted a bespoke system that perfectly fit how our company conducts business. Other platforms attempted to shoehorn our workflow. Filevine is exactly how we wanted it to be and can grow with us as our company evolves."

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