**VERDICO - Salesforce Legal CRM Project**

**Phase 1: Problem Understanding & Industry Analysis**

**1. Requirement Gathering**

**Objective:** Build a CRM tailored for law firms to manage cases, clients, documents, billing and workflow efficiently.

**Key Requirements:**

* **Matter Management:** Central record for all case data.
* **Client Intake:** Online forms, lead tracking, automated onboarding.
* **Time & Billing:** Log billable hours, expenses, auto-generate invoices.
* **Document Management:** Secure storage, version control, e-signature integration.
* **Workflow Automation:** Automatic reminders, task assignments, deadlines.
* **Reporting & Analytics:** Dashboards for revenue, case status, and productivity.
* **Security & Compliance:** Role-based access, encryption, and audit trails.

**2. Stakeholder Analysis**

**1. Primary Stakeholders (Internal)**

* **Managing Partners:** Decision-makers, want profitability, ROI, data-driven insights.
* **Lawyers/Attorneys:** Main users, want less admin work, easy case/doc management.
* **Paralegals/Admin Staff:** Handle intake & filing, want streamlined, automated workflows.
* **Finance Team:** Manage billing/reporting, want accurate invoices, QuickBooks integration, real-time reports.
* **IT Staff:** Handle setup, security, integrations; want scalability & stability.

**2. Secondary Stakeholders (External)**

* **Clients:** Use portal, want transparency, secure access to case progress & documents.
* **Vendors/Partners:** Provide integrations (Dropbox, QuickBooks, e-signature), want smooth data exchange.
* **Regulators:** Enforce compliance, want data security, privacy, and conflict-of-interest checks.

**3. Business Process Mapping**

**Key Processes:**

1. **Client Intake:** Lead capture → onboarding → Matter creation.
2. **Matter Management:** Tasks, deadlines, communication tracking.
3. **Time & Expense Tracking:** Log hours & case-related expenses.
4. **Billing & Invoicing:** Generate and track invoices.
5. **Document Management:** Create, store, share, and version case documents.

**Workflow Steps:**

* **As-Is Workflow:** Manual spreadsheets, fragmented systems.
* **To-Be Workflow:** Automated Salesforce CRM processes: lead forms, Matter creation, reminders, auto invoices.
* **Optimization Impacts:** Reduce manual entry (~80%), faster document generation (~50%), overall efficiency improved.

**4. Industry-Specific Use Case Analysis**

| **Use Case** |  |
| --- | --- |
| **Client Intake Automation** | -Online forms, lead scoring, auto Matter creation. |
| **Matter Management** | -Centralized case record with tasks, deadlines, communications. |
| **Time Tracking & Billing** | -Record hours & expenses, auto-generate invoices. |
| **Document Management** | -Secure storage, version control, optional e-signature. |
| **Workflow Automation** | -Automatic reminders, task assignment, deadline notifications. |

**5. AppExchange Exploration**

**Options:**

* **Build (Custom CRM):** Fully tailored to law firm processes, maximum flexibility.
* **Buy (Pre-built Apps):** Faster implementation; apps like **Litify**, **Suits**, **Practice Panther** with legal-specific features.

**Supporting Apps:**

* **DocuSign / Conga Composer:** Document automation & e-signatures.
* **Accounting Seed / Litify Timekeeping:** Billing & time tracking.
* **Dropbox / Box:** Document storage.
* **Salesforce Shield / OwnBackup:** Security & compliance.