

Phase 1: Problem Understanding & Industry Analysis — LegalAid Connect CRM

Project Title:

LegalAid Connect CRM – Free & Affordable Legal Assistance Management

Goal:

LegalAid Connect CRM is a **Salesforce-based platform** designed to streamline legal aid services, connecting clients, lawyers, and NGOs into one unified ecosystem.

The goals are to:

- Provide structured management for underprivileged clients.
 - Streamline lawyer onboarding and case allocation.
 - Ensure transparent tracking of legal aid impact.
 - Deliver holistic insights into cases resolved, client support, and lawyer performance through Salesforce dashboards and reports.
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1.Requirement Gathering

Engaged Stakeholders:

- Clients (individuals seeking legal help)
- Lawyers/Volunteers (pro bono or low-cost service providers)
- NGOs/Legal Aid Clinics
- Government Legal Aid Departments

Example Requirements:

- Client profile & case registration with issue details.
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- Case assignment system based on expertise and workload.
- Case progress tracking (hearings, documents, outcomes).
- Notifications for hearing dates, pending documents, and case updates.
- NGO/Government dashboards showing resolved vs. active cases.
- Reports on lawyer contribution and social impact (people benefited).
- Community portal for clients and lawyers to log in and view updates.

2. Stakeholder Analysis

- **Platform Administrator:** Manages data, user roles, and platform settings.
 - **Client:** Registers cases, checks updates, receives notifications.
 - **Lawyer/Volunteer:** Accepts cases, tracks progress, updates outcomes .
 - **NGO/Legal Clinic:** Reviews cases, assigns lawyers, monitors progress.
 - **Government/Donor Agency:** Reviews reports on legal aid reach and impact.
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3. Business Process Mapping

Case Management Flow:

- Client submits legal issue.
- System matches lawyer based on expertise & availability.
- Lawyer accepts → hearing scheduled.
- Lawyer records updates & outcomes.
- NGO/Clinic monitors case progress.

Impact Tracking Flow:

- Case resolution status updated.
- Reports generated for NGOs/government.
- Dashboards show number of clients served, resolved cases, and lawyer performance.

Integrated View:

- Admin dashboard combines client support + case resolutions → holistic view of legal aid impact.
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4. Industry-Specific Use Case Analysis

- **Challenge:** Legal aid is fragmented, especially for rural/low-income communities.
 - **Client-centric approach:** Must be simple, mobile-friendly, and transparent.
 - **Diverse stakeholders:** Clients, lawyers, NGOs, and government need role-based access.
 - **Transparency demand:** Donors and agencies need visibility into legal aid outcomes → dashboards essential.
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5. AppExchange Exploration

Existing Solutions:

- LegalServer, Clio, LawGro.

Limitations:

- Built mainly for law firms, not NGOs or government programs.

- Expensive and limited customization for social sector needs.

LegalAid Connect CRM Opportunity:

- End-to-end NGO-focused platform integrating clients, lawyers, NGOs, and donors.
 - Built-in transparency with case tracking & reporting.
 - Affordable, scalable, and community-focused design.
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6.Gap Analysis (Existing vs Proposed)

Existing Systems:

- Disjointed, manual/semi-digital workflows.
- Case tracking scattered across documents/spreadsheets.
- Limited analytics for NGOs/government.

LegalAid Connect CRM:

- Unified client-lawyer-NGO ecosystem.
 - Automated workflows & alerts.
 - Real-time dashboards measuring legal aid impact.
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7.Technology Landscape & Tools

- **Platform:** Salesforce
 - **Service Cloud** → client support, case management.
 - **Experience Cloud** → client/lawyer portals.
 - **Tableau CRM** → dashboards & insights.
 - **Flows & Automation** → case assignment, hearing alerts, SLA tracking.
 - **Optional:** Apex for advanced lawyer-case matching.
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8.Risks & Mitigation

- Low lawyer participation → Incentives, reminders, recognition programs.
 - Case delays → Automated notifications, SLA monitoring.
 - Data errors → Validation rules, structured forms.
 - Transparency issues → Role-based dashboards for NGOs/government.
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9.Success Metrics

- Client adoption % per quarter
- Case resolution time reduction
- Lawyer participation %
- Transparency coverage

- Beneficiary satisfaction score
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10.Future Vision

- **AI-driven case-lawyer matching** based on specialization.
- **Predictive analytics** for case outcomes and timelines.
- **Blockchain-based documentation** for tamper-proof records.
- Scalable adoption across NGOs, legal aid clinics, and government agencies.