

## Streamlining for higher standards

How a small immigration law firm saved time and reduced errors with INSZoom

A small immigration law firm in the Western U.S. introduced INSZoom to their limited legal tech stack to provide their stakeholders the flexibility to streamline communication and other processes across the firm.

### The challenge

This small law firm provides immigration application support to immigrants in western U.S. Its focus is to help people get legal status and avoid deportation. The law firm needed to have up-to-date, best practice communication with clients, who needed a high level of service.

However, the law firm was operating on very limited legal tech and antiquated systems, which hindered it from making agile, precise, and uniform updates across its processes. There was no standardized language for email communications. Information and matters that needed attention were often missed.

Among their chief questions were:

- How do we streamline our processes?
- How can we build an efficient document creation process?
- How can we ensure our documents are compliant?
- How can we guarantee that documents contain the correct details?

### What made the most sense?

The law firm first learned of INSZoom during an industry event, where INSZoom presented its solutions that support immigration businesses around the world.

The immigration law firm needed a solution to streamline and standardized its processes. As an industry leader in immigration technology, INSZoom was the ideal partner.

## First steps towards progress

The first step taken to address the law firm's problems was evaluating its processes and identifying areas for improvement. It was clear that updating and upgrading its case management system was necessary.

INSZoom demonstrated, configured, and delivered a case management platform to replace the law firm's obsolete systems. The best part? The new platform was customized to the law firm's practice. The new environment featured:

- **Cloud-based.** Documents, forms, and other immigration work updates were carried out quickly within INSZoom. The move to a cloud-based file repository saved the law firm a large amount of file storage.
- **SaaS.** As a Software-as-a-Service provider, INSZoom offered the firm great flexibility. INSZoom acted as a remote IT team helping the firm add functionality as it grew and new needs arose.
- **INSZoom Case Management System.** Previously, law firm's staff members would contact clients using different email language. With INSZoom, everyone is using the same email language – making it easy for staff members to track case status.

## The new platform was customized to the law firm's practice.

The platform delivered all the tools needed to streamline its practice workflows. It included:

- Formidable forms library
- Smart case management
- Stakeholder engagement and communication
- Task management
- Compliance management

## What did success look like?

INSZoom successfully streamlined the law firm's processes – from filling up forms to document assembly, document storage, template creation, client communication, etc.

INSZoom supported the customer in structuring its internal business processes:

- **Established task flows.** On top of custom workflow building, INSZoom introduced methodical actions for different types of immigration cases, such as H1B, permanent resident, employment authorization, etc.
- **Streamlined document creation.** INSZoom provided the company with up-to-date forms and empowered it to create compliant documents that were used by all members across the organization.
- **Standardized communication.** The customer addressed its biggest challenge: poor

lawyer-client communication. With INSZoom, immigration lawyers were always on top of proactive communication with all parties through established standard communication processes and uniform email language – from the first email to the final deliverable.

- **Simplified procedures.** With INSZoom's focus on the immigration industry, the law firm was able to improve its practice of law. Tracking, automation, and checking off of every case was made easy for all staff members.

The law firm has realized measurable results, including:

- Improved customer communication
- Standardized language for records
- More efficient and more profitable immigration practice
- Reduced spending associated with wasted time and resources
- More competitive to attract additional clients
- Opportunities to expand business

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