

MODERNIZATION OF PROBATE PROCESS WITH SKILLSOURCE

CLIENT PROFILE

The client is an attorney and the founder of a law firm based in the greater Los Angeles area, specializing in estate planning, trust, and probate law. Their mission is to provide every client with the personalized attention they deserve.

CHALLENGES

- **Outdated Business Model**

Grappled with a growing caseload, leading to operational inefficiencies and delayed client services.

- **Overburdened Staff**

In-house team was overwhelmed with administrative tasks, which hindered their ability to concentrate on essential legal work.

- **Inefficient Intake Process**

Time-consuming manual intake processes were prone to errors.

- **Delayed Processing of Probate Document**

Delays severely impacted case timelines.

- **Accounting Bottlenecks**

Complex accounting tasks related to estate settlements were labor-intensive and prone to inaccuracies.

TRANSFORMATION STRATEGY

- **Intake and Client Management:** Efficient handling of client inquiries, scheduling consultations & managing case information.
- **Probate Document Processing:** Reviewing, organizing & processing essential probate documents.
- **Accounting and Financial Services:** Providing comprehensive accounting services, including financial statement preparation, tax filings & estate distributions.
- **E-Discovery and Document Review:** Assisting with e-discovery processes, including document collection, review, and production.

BUSINESS BENEFITS



- **Optimized Workflows**
- **Alleviated Administrative Hurdles**
- **Enhanced Customer Satisfaction**
- **Liberated the legal team to focus on strategic legal matters.**
- **Optimized Resource Allocation**
- **Minimized operational expenditures**

CONCLUSION

SkillSource's enhancements to the probate process have boosted the law firm's operational efficiency by streamlining workflows, optimizing resources, and reducing administrative tasks. This enabled the firm to focus on high-value legal matters, deliver prompt services, and enhance client satisfaction. The changes also lead to significant financial savings, supporting sustainable growth in a competitive market.