

Case Study:

Elder Law of East Tennessee

How Actionstep became the core of what they do



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Elder Law of East Tennessee

Elder Law of East Tennessee is an elder care law and estate planning firm that helps families respond with confidence and dignity to the challenge everyone faces of aging, chronic illness, and disability. Elder Law of East Tennessee helps people to take control of their long-term care journey, ensuring the service is personalized, and delivered with compassion and respect.

The team at Elder Law of East Tennessee used Actionstep to increase firm value, create new revenue streams and support a successful succession plan. Actionstep was chosen to enable business growth and build toward the ideal outcome of succession – being valuable enough for another firm to buy.

“Part of our succession planning was to have a practice management system that allowed me to be organized and efficient and deliver great services to clients so that it increased the value in the sale of my business.”

– Amelia Crotwell, JD
Founder & Owner of Elder Law of East Tennessee.

Challenges

Elder Law of East Tennessee faced the challenge of putting a system in place that upheld and continued to grow their value in the eyes of potential firms that may buy their firm. It was also important that any new system put in place would continue to ultimately led to positive client experiences and outcomes. This meant that they were in need of a system that was customizable to their way of doing things.

Procurement Process

In the search for an easily customizable legal practice management system, Elder Law of East Tennessee came across Actionstep which would allow them to incorporate their specific ways of handling matters into replicable processes.

Implementation

With Actionstep, the team at Elder Law of East Tennessee were able to tailor their practice management system to their needs. They mapped out the existing processes within the firm for each type of case and matter. This involved identifying and ordering key steps within each case type. From this, they were able to design step by step workflows that were built into their Actionstep practice management system.

Within each step of a workflow, they identified all the associated tasks to be automatically assigned to different team members, as well as the automatic updates that should be sent to clients throughout the case workflow, so they were kept informed on progress.

Benefits of Using Actionstep

The level of customisation Elder Law of East Tennessee was able to implement into their practice management system created team transparency across all the work being done at the firm and built on their efficiency and accountability.

Client experience is at the heart of Elder Law of East Tennessee's business, so having a system implemented that kept these clients automatically informed on their case and providing an efficient, responsive service was a benefit of Actionstep.

Elder Law of East Tennessee used the workflows and templates they created in Actionstep to develop an Elder Law & Estate Planning Toolkit for other firms. Other firms can purchase this as an add-on to their Actionstep system in Actionstep's Marketplace. This provides the firm with a valuable new recurring revenue stream to supplement their legal work.

The add-on includes a set of workflows, templates, custom data fields, participant types and a help guide specific to Elder law and Estate Planning. The add-on can also be further customized once purchased but gives firms practicing Elder Law & Estate Planning a tried and tested set of workflows and templates and other tools to work from right away.

The immense growth of Elder Law of East Tennessee is a hallmark of their success in the implementation of Actionstep. They were able to deliver excellent client services, grow their demand and have a succession plan. This succession plan in place is vital to ensure a definitive future – the practice has systems in place that new owners can use straight away, causing less disruption to the practice and their clients. Elder Law of East Tennessee knew they wanted to work toward selling the practice to another firm or owner, so this value growth has been imperative.

The team at Elder Law of East Tennessee increased the value of their firm through custom workflow creation, which not only gave their clients excellent experiences but enabled such growth at the firm that they were able to sell their practice as part of a long-term succession plan.

“Actionstep has allowed us to grow, it has allowed us to expand because it adds systems, adds organization & efficiency. It gives me a platform for recurring revenue streams. It let me build a successful business that someone else wanted to buy.”

– Amelia Crotwell, JD
Founder & Owner of Elder Law of East Tennessee.

Find out more at:
www.actionstep.com