

The Salesforce logo, which consists of the word 'salesforce' in a white, lowercase, sans-serif font, centered within a blue, multi-lobed cloud shape.

# **SALESFORCE FOR UK-BASED LEGAL CONSULTANCY FIRM**





# CLIENT PROFILE



Our client is a UK-based legal consultancy firm specializing in corporate law services. The firm provides legal advisory and compliance solutions to businesses across various industries, ensuring they meet regulatory requirements and minimize legal risks.

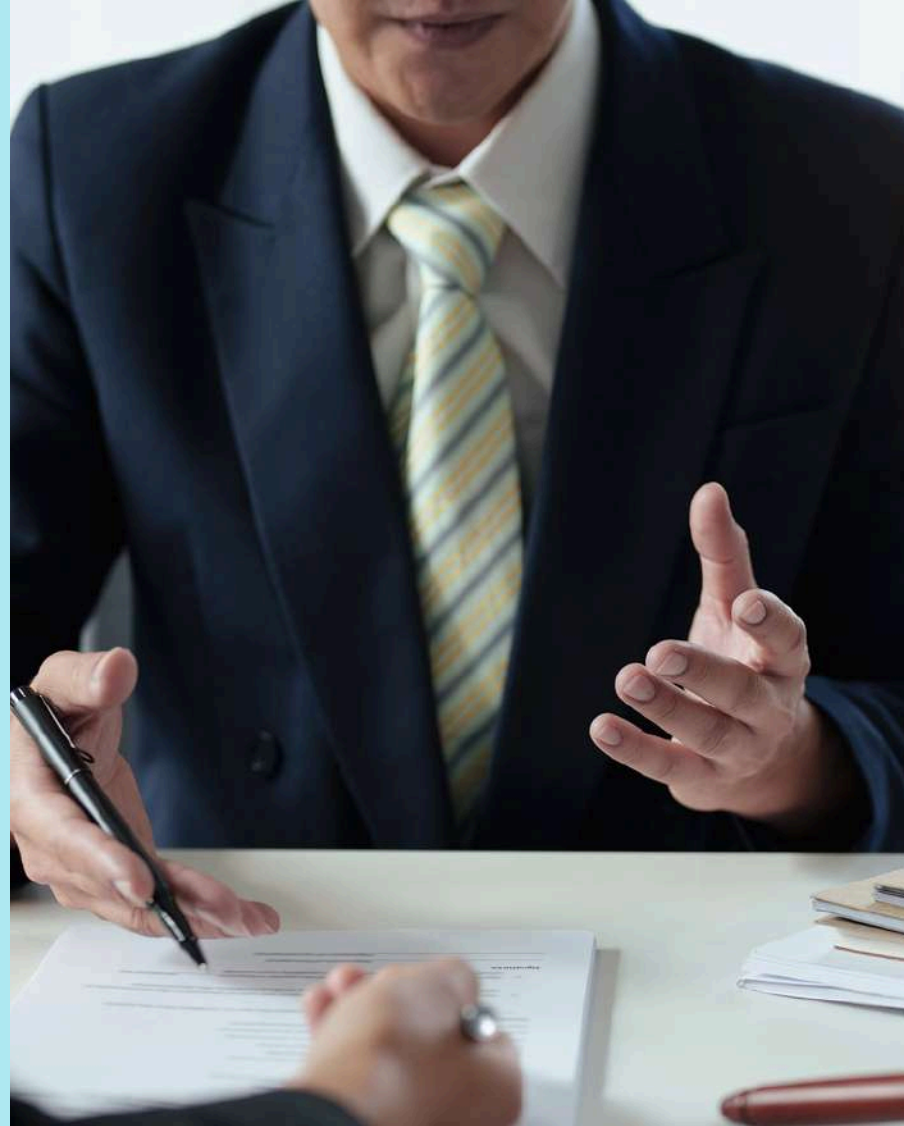
With years of experience in the legal sector, the firm has built a reputation for delivering precise, strategic, and reliable legal counsel. Their team of experienced legal professionals ensures that clients stay compliant with the latest regulatory changes, minimizing legal exposure and potential liabilities.

## ➤ Current Landscape

Our client was using Excel, Outlook, etc, to handle client interactions, legal case tracking, and billing. While these tools provided essential support, our client needed a more integrated and automated solution to streamline processes, improve data accessibility, and enhance collaboration across teams.







# PROJECT BACKGROUND

Our client approached CRM Masters Infotech to optimize their client management processes and improve service efficiency. They had been relying on multiple disconnected tools to manage client onboarding, case tracking, and billing, leading to inefficiencies and data inconsistencies. Their objectives included:

- Centralizing client data and legal case management in a single system.
- Automating contract generation and billing workflows. Enabling a secure client portal for document sharing and communication.
- Enhancing client service management with structured case tracking.



## Region

United Kingdom



## Business Type

B2B (Business to Business)



# Technology We Used



**Sales Cloud**



**Service Cloud**



**Salesforce CPQ**



**Experience Cloud**



**Salesforce Flow**



# CHALLENGES FACED BY OUR CLIENT



## 01 Fragmented Client Management

Client information was scattered across multiple platforms, leading to duplication, delays, and a lack of real-time insights.

## 02 Manual Contract and Billing Processes

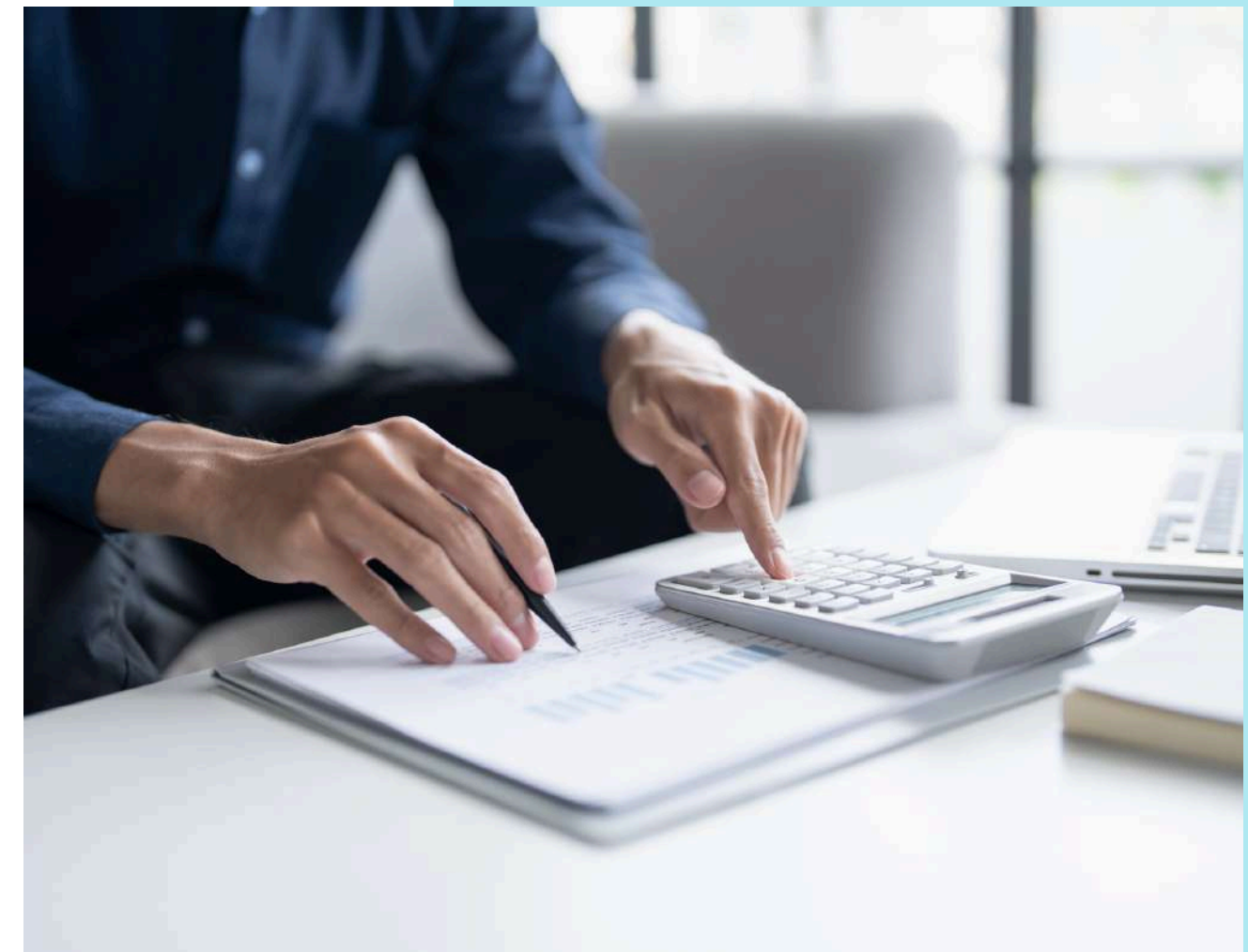
Contracts and invoices were manually generated, resulting in errors, inefficiencies, and delayed payments.

## 03 Limited Client Self-Service Options

Clients had to rely on emails and calls for updates, leading to an excessive workload on legal consultants and slower response times.

## 04 Lack of Structured Case Tracking

The firm lacked a standardized way to track case progress, making it difficult to manage deadlines and compliance requirements.





# OUR SOLUTIONS



**01** Salesforce Sales Cloud for Better Data Management

**02** Salesforce CPQ for Automated Contract and Billing Processes

**03** Salesforce Experience Cloud for a Secure Client Portal

**04** Salesforce Service Cloud for Case Tracking

**05** Workflow Automation with Salesforce Flow



## 1. Salesforce Sales Cloud for Better Data Management

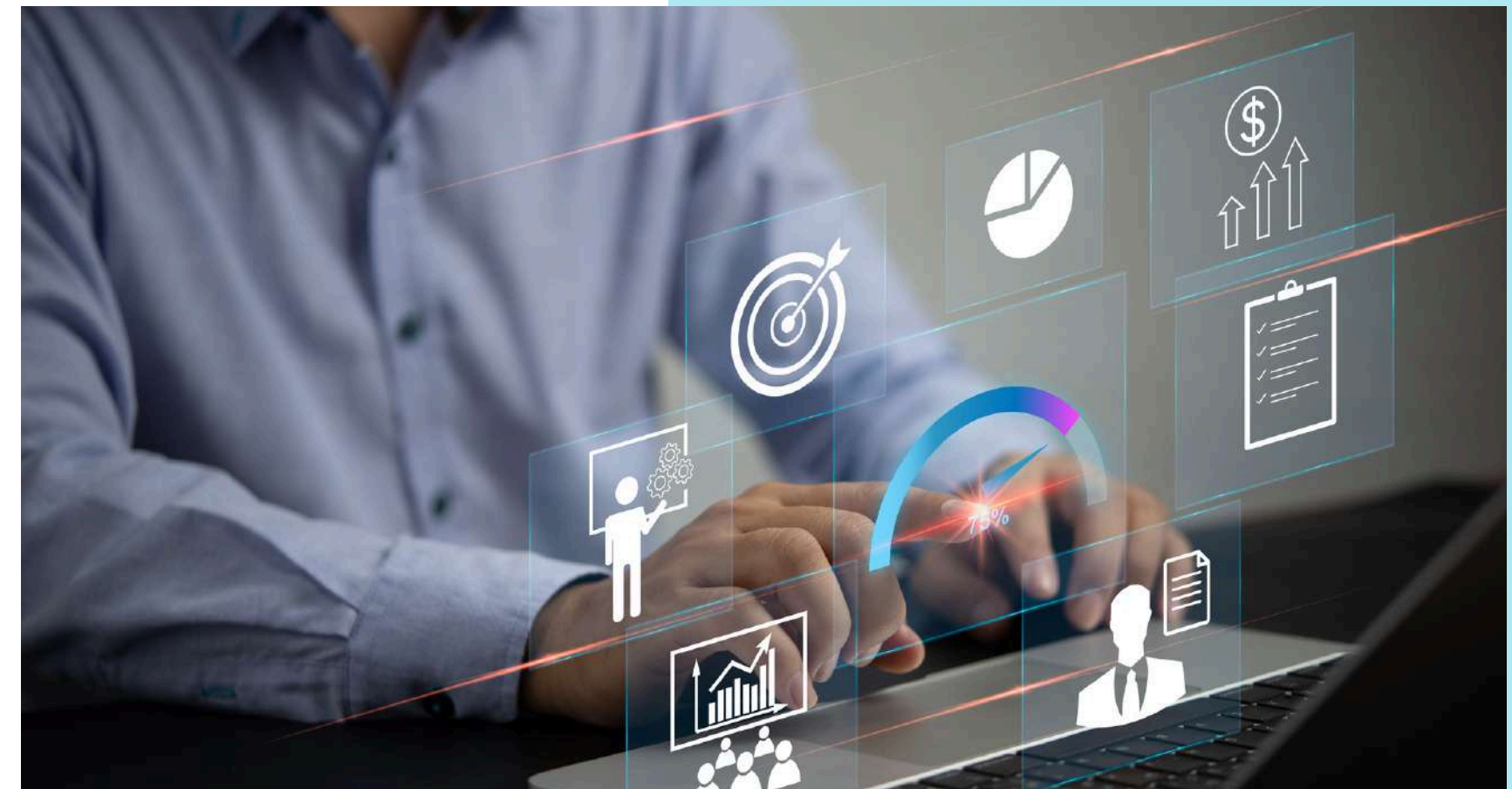
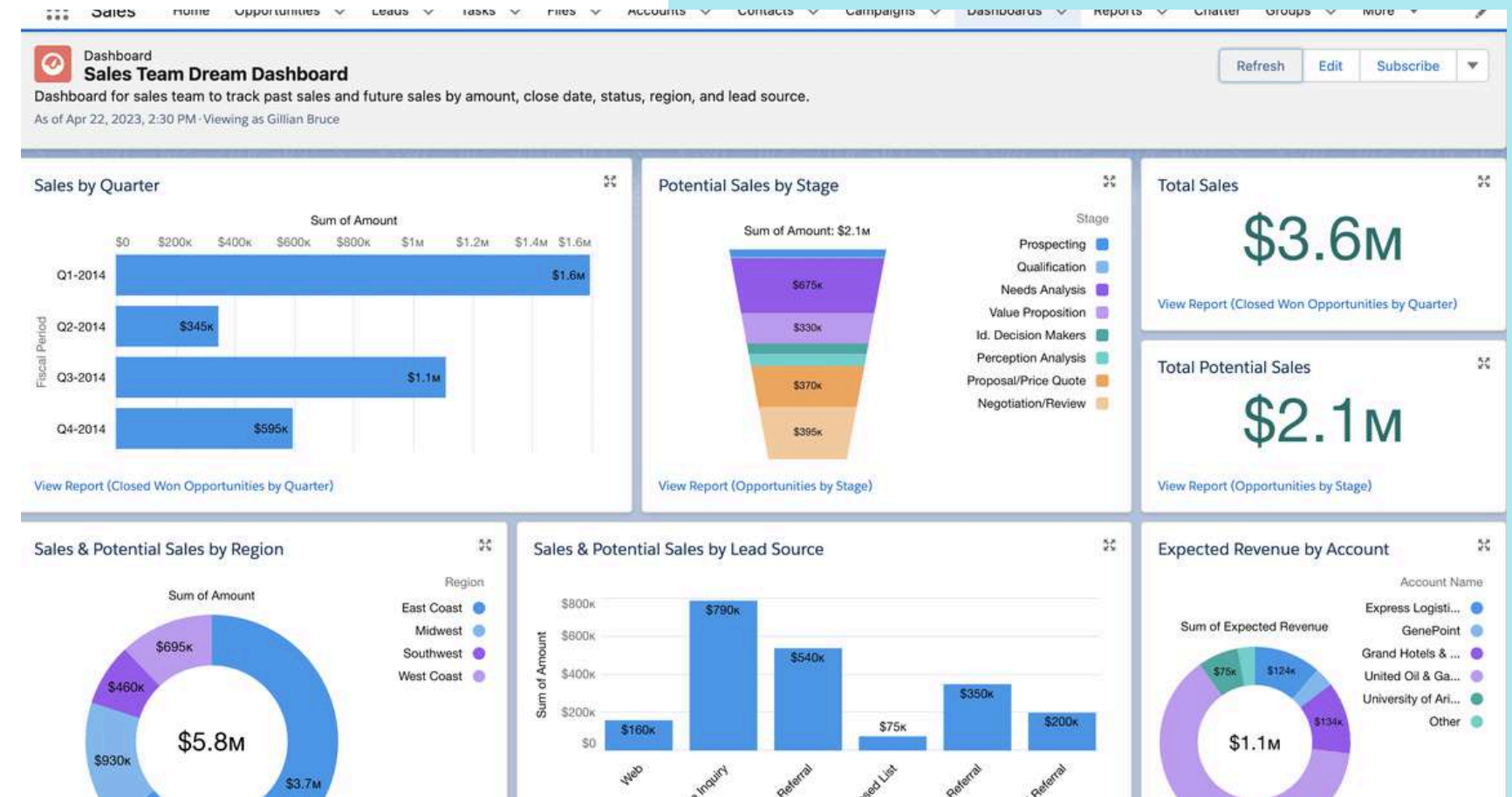
We implemented Salesforce Sales Cloud to consolidate client records, legal case details, and communications into a unified system, providing a 360-degree view of client interactions.

## 2. Salesforce CPQ for Automated Contract and Billing Processes

By integrating Salesforce CPQ (Configure, Price, Quote), we automated contract generation and billing workflows, reducing manual effort and ensuring accurate invoicing.

## 3. Salesforce Experience Cloud for a Secure Client Portal

We deployed Salesforce Experience Cloud, enabling a self-service portal where clients could securely access legal documents, track case progress, and communicate with legal advisors.







#### **4. Salesforce Service Cloud for Case Tracking**

To improve legal case management, we utilized Salesforce Service Cloud, allowing our client to track case progress, assign tasks, and set automated reminders for compliance deadlines.

#### **5. Workflow Automation with Salesforce Flow**

Using Salesforce Flow, we automated repetitive legal processes such as client onboarding, document approval, and case updates, significantly improving operational efficiency.





# RESULTS

CRM Masters delivered a customized and scalable Salesforce solution that transformed the client's legal service operations.



## ➤ Operational Efficiency Boost

Reduced manual workload by 80% with automated workflows and data integration.

## Key outcomes included :

### ➤ Simplified Client Management

Achieved a unified database for all client and case-related information.

### ➤ Automated Contract & Billing Workflows:

Reduced contract processing time by 70% and minimized invoicing errors.

### ➤ Enhanced Client Experience

Clients gained 24/7 access to legal documents and case progress through the self-service portal.

### ➤ Improved Case Tracking & Compliance

Achieved 100% adherence to compliance deadlines with automated reminders and case tracking.







# About CRM Masters Infotech

ENABLING GROWTH THROUGH  
DIGITAL TRANSFORMATION

CRM Masters Infotech is a **trusted Salesforce consulting partner**, specializing in customized CRM solutions for businesses worldwide. With a global presence across India, the UK, and the USA, we help organizations optimize Salesforce to improve efficiency, customer engagement, and business growth. We have a team of **100+ certified Salesforce experts** to ensure your success with seamless implementation and support to drive digital transformation for our clients.





# LET'S TALK & FIND YOUR SOLUTION



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