

CASE STUDY

Dalton & Finegold

How Dalton & Finegold Cut Their Paper Usage By 70% In One Week

ABOUT

Dalton & Finegold is a full-service civil law firm based in Andover, Massachusetts. Dalton & Finegold has been on the Qualia Platform since 2015 with 3 offices spread across the state of Massachusetts and one in New Hampshire. Although the Dalton & Finegold team knew that they wanted to start the process of going paperless in 2020, the COVID-19 pandemic sped up their timeline. We sat down with Christina Petrucci, Attorney and Partner, and Anne Webster, Chief Operating Officer, to discuss why their team decided to go paperless, how they accomplished it, and what their operations look like now.

“We are a more efficient team and office because we decided to go paperless. In the last year, our teams have managed 200-300 closings a month. If they had to manually print and scan documents, there wouldn’t be enough hours in the day.”

—Christina Petrucci, Attorney and Partner at Dalton & Finegold

DALTON
& FINEGOLD, L.L.P.

INDUSTRY

Real Estate Law

HEADQUARTERS

Andover, Massachusetts

FOUNDED

2000

WEBSITE

www.dflp.com

ABOUT

Dalton & Finegold is a full-service civil law firm. With 3 offices across Massachusetts and New Hampshire, the Dalton & Finegold team makes efficiency and excellent client service a priority.



Ready to learn how Qualia can help your business? Contact us at qualia.com/demo



CHALLENGE

Prior to going paperless, the Dalton & Finegold team used a file system to prepare for closings and to keep their orders organized. While this system worked, it required a large amount of paper to print and scan closing documents. It was also inefficient and time-intensive.

For example, when an order was opened, Christina shared that the paralegal teams would print out every document that was edited and saved in Qualia during the file processing and place them in the file folder. Any time edits were needed, new documents were printed, placed in file folders replacing and shredding the previous ones. Several times throughout the life of the file this process occurred.

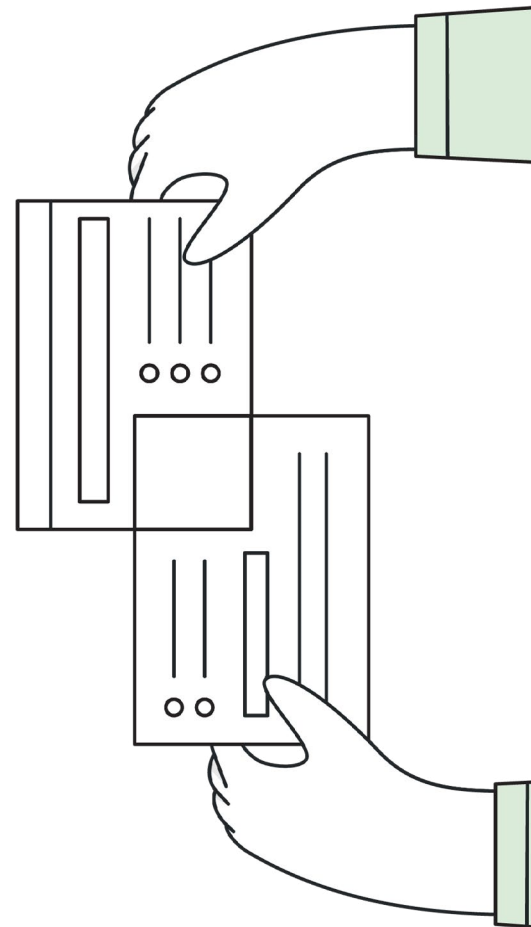
SOLUTION

In March of 2020, Christina and Anne jumped into action to eliminate paper from their team's workflow. They thought it would be a three year process. With Qualia, it only took them 1 week. They were able to do this because of the document management and remote capabilities the Qualia platform provides.

DOCUMENT MANAGEMENT

Qualia makes it easy to generate, update, and organize documents. Information from an order flows directly into the documents within Qualia and documents can easily be "refreshed" to show the latest changes. This eliminates the need for documents to be printed and then reprinted anytime a change is made.

Additionally, Qualia's document management system allows for files to be organized. To help their team make a seamless transition, Anne and Christina organized their files in Qualia in a way that was reminiscent of the paper files their team had used before. Qualia's document management features also include splicing and merging functionality, making it easy to separate or combine files without having to leave the Qualia Platform.



Ready to learn how Qualia can help your business? Contact us at qualia.com/demo



ACCESS FROM ANYWHERE

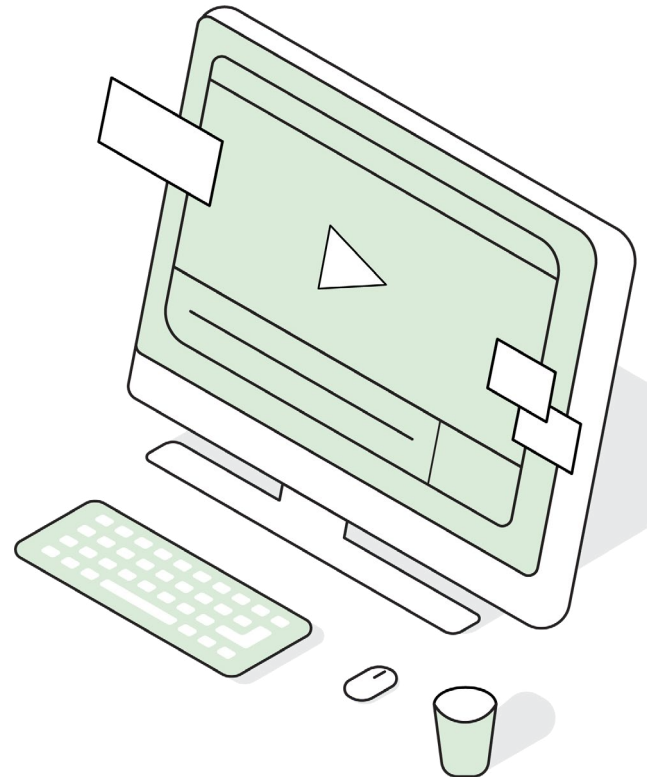
Qualia's cloud-based capabilities eliminated the need to scan documents to the post-closing department's office. Christina and Anne now store the documents in folders within Qualia, making it simple for staff members with the correct access permissions to retrieve the files from anywhere.

“We're able to access all the documents we need with a few clicks of a button in the Qualia Platform. This allows our team to maximize efficiency from wherever we're working.”

—Anne Webster, Chief Operating Office at Dalton & Finegold

RESULTS

Dalton & Finegold team has reported a 70% decrease in paper consumption since that week in March of 2020. Not only have they lessened their environmental impact, but they have also saved time, freeing up their team to focus on other areas of need such as business development and managing client experience. In 2020, record-low interest rates nationwide sparked an increase in refinance transactions while a hot real estate market simultaneously boosted purchase transactions. The Dalton & Finegold team experienced a 3X increase in volume this past year. With a paperless system, the team was able to spend less time scanning and printing documents, and more time focusing on their clients.



Ready to learn how Qualia can help your business? Contact us at qualia.com/demo