

## Customer Success: Jacobs and Schlesinger



Jacobs & Schlesinger is law firm specialized in immigration and nationality law and appellate litigation. Composed of 15 employees from diverse backgrounds, Jacobs & Schlesinger is dedicated to improving the community through compassionate and ethical legal services.



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### Goals



Centralize IT infrastructure and comply with industry standards and regulations



Better manage client contracts and speed up customer acquisition



Centralize HR records and automate HR processes

## Challenge

Many law firms are still very traditional when it comes to IT and digital workplace practices. Before moving to G Suite in 2013 and AODOCS in 2014, Jacobs & Schlesinger had struggled for years with an obsolete communication platform that wasn't able to store any emails for longer than 30 days. This meant that protecting and maintaining years and years of critical information required constant management and costly physical backups.

Largely working with paper-based processes and Microsoft Word and Excel files, they had no real digital document management system. Files were sent via email and editing involved many downloads, uploads, prints, scans, and new attachments - a version-control nightmare and an extremely time-consuming process. Moreover, whenever an employee left the firm, file retention and the transfer of information was a nightmare without the automatic backup and centralized storage provided by the cloud.

Lastly, retaining new clients took a lot of time. Their process required an internal paper-based and email contract review process followed by sending the final document to clients by email. It was then necessary to constantly follow up and chase the final signatures, costing the firm valuable time. Apart from wasted time, Jacobs & Schlesinger was also spending a significant amount of money on obsolete IT infrastructure that was generally meant for sole-proprietors.

## Story

Jacobs & Schlesinger felt a real need to redesign their processes and workflows. They chose to move all of their documents to Google Drive, a great first step to achieving the automation and efficiency that they were looking for. However, Drive alone did not solve all their problems as their workflows were still sluggish and their IT infrastructure wasn't as centralized as they would have liked.

AODOCS was the missing piece to the puzzle. Completely integrated G Suite, AODOCS allowed Jacobs & Schlesinger to bridge the gap between Microsoft Office and Google Drive. AODOCS provided Jacobs & Schlesinger with efficient and secure operational processes by giving their attorneys the flexibility to work with the Microsoft files that they were used to while centralizing them in Google Drive for better editing and version control. Thanks to AODOCS, employees were able to stop constantly downloading and uploading documents, saving the firm a huge amount of time.

AODOCS libraries have allowed for centralized document ownership and robust sharing permissions, features that Jacobs & Schlesinger needs to comply with many industry standards and regulations. With AODOCS, the firm can be assured that all documents are still accessible and protected when an employee leaves the company.

"AODOCS is giving the small business I work for the ability to develop tools and automated processes historically only available to businesses much larger than ours. We recently increased our monthly investment in AODOCS nearly 10 fold because we're convinced that it's going to pay serious dividends."

**Lucas Wiscons**  
Operations Manager



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AODOcs also allows Jacobs & Schlesinger to better manage client contracts and speed up customer acquisition. With AODOcs, Jacobs & Schlesinger was able to completely automate their contract management process by creating a customized workflows based on the client and contract type. After attorney review, all parties can digitally sign the contract, avoiding using any paper and greatly speeding up the client retention process.

Last but not least, Jacobs & Schlesinger uses AODOcs to centralize HR records, automate processes, like reimbursement requests, and other HR management functions. With AODOcs, they no longer need to pay for an expensive, third-party HR management solution.

## Results

Jacobs & Schlesinger began seeing the benefits of AODOcs almost immediately. AODOcs' libraries gave them centralized ownership and robust document sharing permissions while Universal File Opener allowed them to seamlessly work on Microsoft Office files within Google Drive.

"With AODOcs, we're getting a flexible solution to solve quite a few of our procedural problems," said Lucas Wiscons, Operations Manager at Jacobs & Schlesinger.

Perhaps the law firm's biggest achievement has been reducing the amount of time it takes to retain new clients. It now takes Jacobs & Schlesinger, on average, only three days to sign a new customer whereas, in the past, it took at least two weeks. Time savings also lead to cost savings. With less follow up emails thanks to the automated workflows in AODOcs, the firm has more time to work on other cases.

Also, with AODOcs' flexible functionalities, Jacobs & Schlesinger was able to simplify their IT infrastructure and cancel a number of other services, saving them hundreds of dollars per month. By expanding their implementation of AODOcs, Jacobs & Schlesinger is expecting to decommission even more of their expensive third-party IT services.

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## AODOcs

A modern, intelligent content services platform designed to address content chaos within all departments and across all industries

AODOcs is the only document management and business process platform fully integrated with G Suite, allowing organizations in all industries to easily control their documents, scale their business-critical processes, and meet compliance requirements while enhancing user experience. Replacing legacy ECM platforms with a cloud-based, collaborative platform, AODOcs dramatically reduces the time and money spent maintaining IT systems. AODOcs' patented business process platform is used by Google and recommended for G Suite.

Headquarters  
3280 Peachtree Road NE  
8th Floor  
Atlanta, GA 30305  
Email: [info@aodocs.com](mailto:info@aodocs.com)  
Website: [www.AODOcs.com](http://www.AODOcs.com)