# LEADDOCKET

## SIMPLE LEAD TRACKING FOR LAW FIRMS

# CASE STUDY

*The Disability Guys™*
**Markhoff & Mittman** P.C.

For 5 years, we developed in-house a system based on Microsoft CRM. So, when we decided to begin an extensive software search process, we were already power users of a dedicated intake system.  We looked at 10+ systems. After looking at these, we narrowed the search to two, one of which was Lead Docket. The decision to switch to Lead Docket was one of the best decisions we have ever made.

We have been using Lead Docket since July 2017.  In that time period we have seen a steady increase the effectiveness of our intake team. We have 2 full time and 3 part-time intake staff.  Our ability to sign up cases has increased, and we are signing in some months, over 100% more cases.  The average month is at least 30% more cases than we were prior to implementing Lead Docket.

First, and foremost, the system changed the way we think about intake.  We moved away from task-oriented processing of leads and into a status driven process. This made our team more efficient, as we were working on the cases based on where they stood in the process - allowing us to prioritize those closest to being signed.

Next, the system is intuitive to use and has allowed us to more easily train new users than it was under our previous CRM system. The videos provided by the team at Lead Docket are easy to follow for new users to learn. And Eric and his team have always made themselves available for quick calls whenever we had a question.

As far as features, Lead Docket covers 100% of the things we sought from a lead management system. We particularly like the automated messaging based on case status. In addition, the team has welcomed our input. Usually, the features that we sought could easily be handled by the system with a small adaptation on our part in the way we work. But in addition to that, there are a number of features we have suggested which have ended up as additions to Lead Docket.

We handle a variety of case types, including workers compensation, Social Security disability, long term disability, and mass tort pharmaceutical / medical device cases.  Lead Docket has custom fields that allow us to have unique screening criteria for each case type. The system also has robust built in report plus the ability to export data to XLS files for any customized reporting we want to do.

**FOCUS**
Workers' Compensation, Social Security Disability & Mass Torts

**TIMEFRAME**
July 2017 - Present

**LOCATION**
New York

**CASE MANAGEMENT SYSTEM**
Custom Case Management System

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