

STREAMLINED CALLING AND PERSONAL NUMBER PROTECTION



Integrating ESI Cloud Phones & Clio Practice Management

Background

Davis & Thompson, PLLC is a general practice law firm with more than 140 years of combined legal experience. The firm handles various legal matters, including banking, real estate and civil litigation, probate, estate planning, and business, family, and criminal law. They represent individuals as well as banks, real estate developers and homeowners' associations, municipalities, and rural water districts. Davis & Thompson has seven attorneys and is based in Jay, Oklahoma.

Like many law firms, an on-premises phone system with a variety of convenience and productivity features was in place to support in-office activity. When COVID-19 and the pandemic dictated change for most everyone, a modified approach and new features became a necessity. Although the everyday routine changed, the ability to maintain seamless, responsive connectivity with clients did not.



Supporting the Firm's Needs

Practice Management Integration

The firm quickly determined that upgrading to a Cloud or VoIP system was the path to improved functionality and increased productivity. Clio's practice management software was at the core of the firm's client information systems, and integrated calling and time tracking was a driving factor. The firm sought direct, streamlined connectivity.

Personal Number Protection

Attorneys and staff needed to use their personal smartphones to communicate with clients, and they wanted to shield their personal phone numbers while conversing on firm matters.

Remote Access

To effectively support the remote access required, attorneys and staff alike needed to be able to work as if they were still in the office. That meant seamless connectivity to client information, internal staff, and consistent external communications. "At the core, firm members needed to be able to take their phone with them and stay in touch," noted Christianna Wright, Attorney. Also important was the ability for calls to be effectively handled and routed during high-volume periods, whether by the primary receptionist or another firm member.

“ESI-Legal provided all the critical features we knew we needed to operate smoothly in a remote environment. It was a clear decision”

Christianna Wright, Attorney

Consistency and Responsiveness

Maintaining Productive Workflow

Knowing firsthand what was needed to support productive workflow, one of the attorneys, Christianna Wright, took the reins on the research. Multiple systems were explored, and ESI-Legal’s Cloud Phones for Lawyers was determined to be the optimal path. The recommendation was presented to the firm members, and everyone quickly agreed on the decision.

Responsive Support and Service

In addition to the features required, the firm valued the highly responsive service they received from ESI-Legal. Ultimately the combination of an easy and well-managed system, cost-effective pricing, and the Clio integration were the deciding factors. As you would expect with any new system, there was a short learning curve, and the ESI-Legal team’s training, support, and weekly check-ins made it a positive transition.

Flexible Devices and Integration to Take Care of Business

Today, smartphones are the primary devices used by firm members. The ability for attorneys to use their personal devices to call a client without exposing their personal number is critical. Clients recognize incoming calls the same as when it is placed from the office. This enables attorneys to handle business with high responsiveness while maintaining appropriate privacy and work/life balance.

The Clio integration saves time and reduces admin activity. While working in Clio to review client information, users no longer have to hop to a different system or external source to find and enter a number to place a call. A simple click starts a call with the ability to remain in the matter record to access relevant information or an alternate number. Incoming calls are easily handled as the contact record automatically pops up on the screen, and calls can be easily added to a billing system to track and capture time.

The firm’s receptionist has the primary responsibility for managing calls. However, when call volumes are high or when the receptionist is unavailable, additional staff can easily manage call routing on their handsets, computers, or smartphones. Calls can be directed to backup resources to properly distribute them, cutting down on missed calls and reducing voicemails.

Taking Care of Clients – What it’s All About

While most of the firm has returned to the office, the need for flexibility remains. Now Davis & Thompson is prepared to handle its telephony needs without regard for location or work conditions.

Maintaining the high level of responsiveness their clients expect is paramount. With the ESI-Legal Cloud Phone system, Davis & Thompson is well-positioned to continue delivering exceptional client service.

