

**Case Study:**

**FWCanada**

**Canadian Immigration Law**

Every year, thousands of Americans are denied entry into Canada because of previous criminal convictions. These crimes typically aren't the high-profile type you might expect – murder or grand larceny – but rather consist of more mundane infractions, such as old DWI convictions. Canada takes these convictions very seriously, and while it is possible for people with felony convictions to gain entry into the country, it can require a lengthy process involving multiple government agencies on both sides of the border.

In situations like this, a would-be visitor to Canada needs help to navigate through the less-than-intuitive backwaters of the country's immigration law. If they're lucky, they start the process with a call to FWCanada.

Helmed by Supervising Attorney Marisa Feil, FWCanada specializes in helping Americans resolve immigration issues caused by past criminal convictions. While there are plenty of large firms that specialize in Canadian immigration law, most of them focus on the volume of their client intake rather than the quality of their services. FWCanada may be a comparatively small practice – just eight employees – but its extensive experience and focus allows them to consistently deliver the best possible results for their clients.

Unfortunately, delivering this high standard of client care also requires a lot of paperwork. Every moment that Feil and her team spends chasing down clients to get an important fact, document, or signed application means they have less time to move other cases forward. To grow the firm, FWCanada needed a communications and automation solution that could handle their unique needs.

# Challenge

"We had tried to use CRMs in our practice before," says Marisa Feil. "The type of work we do is very niche, and it didn't fit with any of the CRMs we tried because they weren't really customizable or automated... I was always fighting against them, and trying to work around the preset workflows just to get them to do what we needed."

The bulk of FWCanada's cases fall under the category of administrative law in Canada, a heavily procedural system that often requires a staggering amount of documentation. Much of her staff's time is spent gathering facts, filling out forms and applications, compiling the necessary documents from the various state and federal court systems in the U.S., and making sure that those documents are always up-to-date, accurate, and – most importantly – signed. Effectively managing all of those documents was an ongoing issue.

"In our practice, we have a lot of government forms that are required, as well as additional documents that accompany those government forms," Feil says. "In the past, we were managing everything through just email and attachments, which was pretty difficult. Those attachments would have to be sent back and forth, and then downloaded to individual computers.

It's difficult to be sure that you're always saving the correct version, knowing what changes that were being made in each version, or if the most recent version was actually downloaded onto the computer that you were using."

While most CRMs have some form of document management, those tools simply weren't robust enough for FWCanada's needs. In addition to the standard case-management and intake tools, Feil also needed any CRM they adopted to provide fully customized workflows (automation) for automating the most labor-intensive tasks that would otherwise be handled by her staff. She even envisioned a user-friendly option that would allow her clients to fill in their own applications without getting hopelessly lost in the process.

Not surprisingly, finding a workable solution to FWCanada's paperwork struggles was at the top of Feil's list when she was approached about trying a new legal CRM called Leverage.

# Solution

One of the strengths of the Leverage platform is that it is an exceptionally flexible system that can be fully customized to fit a variety of needs and use cases. A good example of this is the Smart Intake™ tool, which allows firms to create automated intake interviews for streamlining the client screening process. Beyond intake, Feil immediately saw the potential to use Leverage's technology to solve her firm's document management problem.

"We were talking about Leverage's automated intake system, and that made me wonder if it was possible to use Leverage to build an entire case file," Feil says. "Could we basically turn the government forms into a questionnaire? That was a wishlist item for me. I've always wanted to be able to send my clients a simple questionnaire, rather than have them fill out some scary-looking government form that has a million fields to fill out."

So she asked Leverage founder Ray Gallo if it was possible to turn the platform's Smart Intake™ system into a user-friendly system for building a case file. As Feil recalls, there was barely a pause before Gallo responded, "Yeah, we can do that."

After a short development and implementation process, Leverage's team was able to make Feil's vision for an automation-driven case-building system a reality. This new tool soon became an integral part of FWCanada's daily operations.

"Leverage automates the entire process of building the case file for us," she says. "That part of the process – collecting and organizing the documents, and making sure that we have everything – is the most complicated stage. Now, the clients can upload documents directly into the system, and we can review everything from within Leverage itself. We can print off all the documents easily, and there's no question about if we're looking at the correct version. The most recent update is always visible to the case managers. Leverage has revolutionized the way that we get this information from our clients."

While her staff isn't using every feature of the software, they are becoming increasingly comfortable with it. Feil was deeply involved with the CRM's implementation process, and as a result she has also come to appreciate Leverage's more traditional legal CRM tools as well.

"In our practice, Leverage creates an ecosystem where everything can live," she says.

# Results

Just a few months later, Feil already sees plenty of potential benefits. Leverage enables FWCanada to do more with the same resources.

"I always look for better ways that we can use our time," Feil says. "My law office is an all-female law office. A lot of us have children and families, and I want us to be spending our brain power and our time doing things that are very high value for our clients. Compiling documents, and chasing documents down from our clients, is not a good use of brain power. I'm excited to see how much more efficient we can become using Leverage."

Feil notes that this automation-driven approach to case management also lines up with where she sees the overall practice of law heading in the future.

"We don't need to sit here and charge clients by the hour for putting documents together in a pile," she says. "That's pretty silly."



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