

# 3X THE TRANSACTIONS AND 2X THE REFERRALS

HOW TRACK WITH EASE DROVE SUCCESS AT AVANT LAW FIRM

2017

AVANT LAW FIRM DISCOVERED TRACK WITH EASE BY ACCIDENT AND SINCE THEY STARTED USING IT, THEIR BUSINESS HAS MORE THAN DOUBLED, WHILE REDUCING THE TIME WASTED IN HALF. THIS CASE STUDY HIGHLIGHTS THE KEY THINGS AVANT LAW FIRM DID TO “GROWTH HACK” THEIR BUSINESS TO RAPIDLY INCREASE THEIR CLIENTS, PROFITABILITY, WHILE MAKING BUSINESS AND WORK-LIFE BALANCE MUCH EASIER

# ABOUT AVANT LAW FIRM

**Avant Law Firm** discovered Track With Ease by accident and since they started using it, their business has more than doubled, while reducing the time wasted in half.

This Case Study highlights the key things Avant Law Firm did to “growth back” their business to rapidly increase their clients, profitability, while making business and work - life balance much easier.

Avant Law Firm represents both individual and corporate clients in civil litigation and in the purchase or sale of real estate. The firm’s downtown Newark office was founded in 2002 by Marjory Avant, Esq., then a solo practitioner. Civil litigation, landlord-tenant law, and small business formation services have grown to include residential investment transactions and other real estate agreements.

Heading the real estate practice is Casey Egger, Esq., who joined the firm in 2012. Egger leads the firms’ representation of experienced investors and first-time home buyers alike. She assists in complex joint venture agreements, wholesale assignments, and sales of business assets.





# HOW TRACK WITH EASE DROVE SUCCESS AT AVANT LAW FIRM

After implementing Track With Ease in December of 2015, Avant Law Firm, an all-female law firm in Newark, New Jersey specializing in real estate and civil litigation was able to shatter all of their volume goals for 2016. In addition to getting more referrals and closing more transactions, the firm's attorneys also saved tons of time. Casey Egger, Esq. was able to quadruple her vacation time in the very same year she made partner. Above all, Avant Law Firm became the go-to for clients seeking superior, timely service.



# BUSINESS BEFORE TWE

## DROWNING IN WORK

Casey Egger, Esq. began managing the firm's real estate practice in 2013. She had been fresh out of the Cleveland-Marshall College of Law, and as a recent grad quickly became overwhelmed with the transactional details of her chosen specialty.

In those first two years at Avant, Casey Egger Esq took just one week of vacation time, and had zero time for herself. It was a classic case. She was overworked, overstressed, and too busy to try new time management methods – and didn't even have enough time for time management, ironically.

Egger had been using a variety of common systems and tools most attorneys try to use for tracking clients and deals and transactions -- spreadsheets, Google apps like Calendar and Drive, and well-organized paper files. But with no communication or commonality between all necessary documentation, her efforts at getting on top of her work load were similarly fragmented, making even simple things like obtaining signatures complicated with lots of back and forth.

## RELYING ON OLD TECHNOLOGIES

The firm's transactions relied on old technologies like printers, scanners, and fax machines to get the job done, but fortunately Casey was tech-savvy enough to know there had to be another way. She first tried a popular legal software but was disappointed that it wasn't tailored towards her real estate specialty and required a lot of setup time while producing very little measurable impact.

Avant Law Firm also needed an e-signature platform that was tailored to real estate law and provided collaboration features representative of business at Avant Law Firm. The likes of DocuSign, Echosign, and other e-signature platforms just didn't cut it because they didn't design for all the other things that happen around signatures in a busy law firm. The entire firm was hoping to reduce email, save time, and combat the overall drudgery that comes along with detailed transactions but was still stuck with the growing pains.





# THE TRACK WITH EASE SOLUTION

## MOMENT OF DISCOVERY

Casey Egger Esq discovered Track With Ease at its Beta launch party in November of 2015.

“I had heard about it from a colleague and am always interested in events happening in my field and in my area,” says Egger. After talking with both CEO Chander Singh Esq and COO Paul Yevzikov, Egger was convinced to give the new transaction management tool a try. “I was able to immediately see that this software could change the way I was doing business,” says Egger. “Within that first week, a construction project needed an additional loan from a private lender and wanted a large sum of money that same day. I was able to send a quick note to request the money, share my existing wiring information, and upload a conflict waiver all inside Track With Ease. When I added the parties’ signatures to the conflict waiver, the software sent out notifications, including to myself. I didn’t have to write any emails. I didn’t even have to print anything out. Within twenty minutes, I had the conflict waiver signed, the money in my account, and I was able to forward it onto the construction project.” That was the defining moment that inspired the entire Avant Law Firm to move their entire Law Practice onto Track With Ease.

## ONBOARDING THE FIRM

After that positive experience, the Avant Law Firm was motivated to bring in all transactions. With the help of a pot coffee, the attorneys quickly moved 60 existing cases into Track With Ease in a single day.

“For us just the one of the many features that made the switch completely worth it was the e-signatures,” says Egger. While the e-signature feature remains the most critical for Avant Law Firm, although they routinely rely on other, complimentary aspects of the product as well. Saving, maintaining, and sharing files has resulted not only in cost savings on paper toner, but has also increased their readiness in the event of an audit. Centrally storing transaction history makes business run faster in the moment while preparing the firm for unexpected litigation in the long run.



# BUSINESS AFTER TRACK WITH EASE

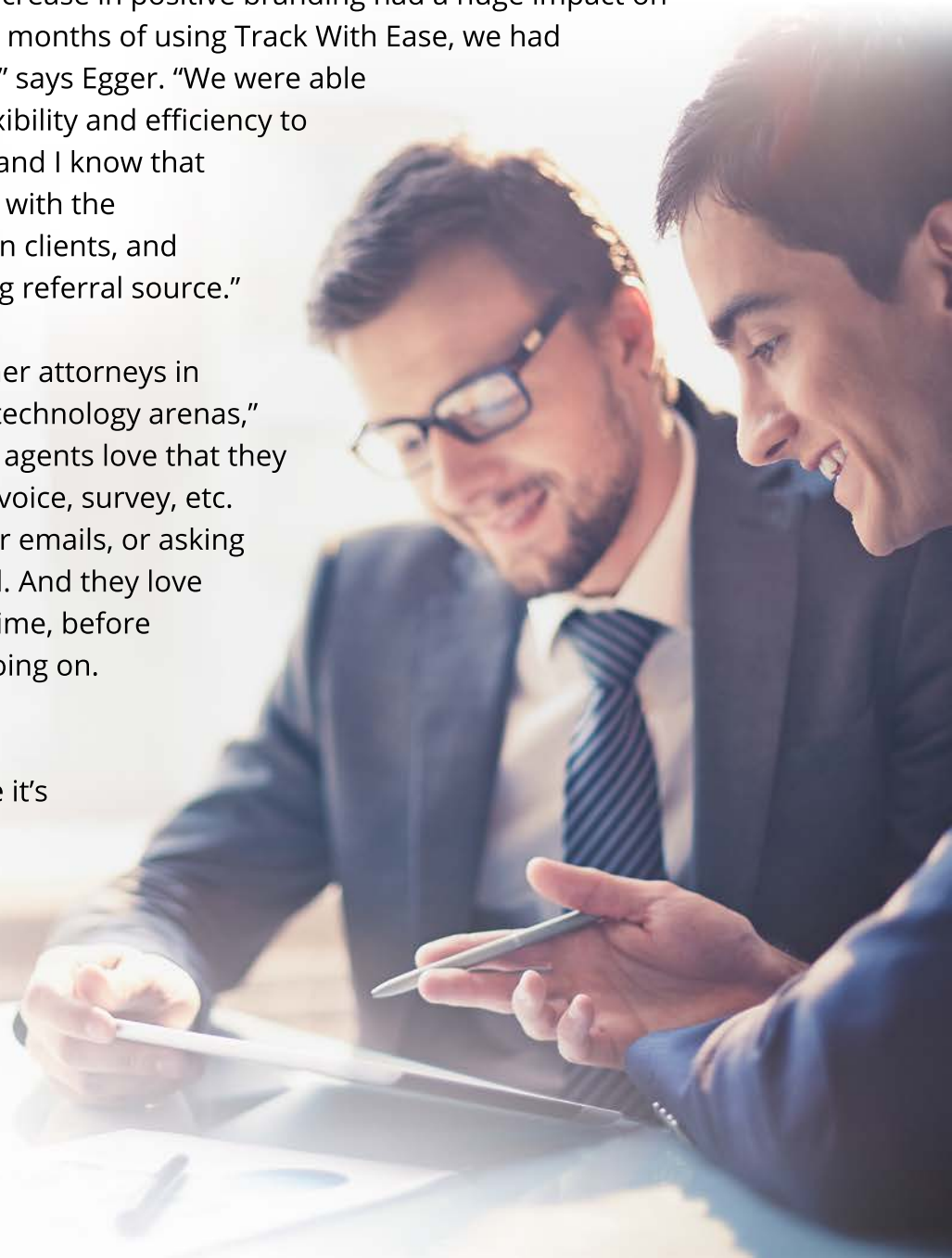
## A REPUTATION FOR TECHNOLOGY-BACKED SERVICE

Clients and real estate professionals who had worked with Avant Law Firm started tagging them in social media posts about how quickly Avant had facilitated a deal, or how they had come through in the nick of time. "It's great...now we keep getting all this unsolicited positive feedback both in person and online. It really helped with our branding, and we don't do any marketing," says Egger.

"Everything is 100 percent word of mouth, it just spreads on its own thanks to Track With Ease" Thanks to the viral nature of Facebook, Avant Law Firm quickly became known as a tech-savvy, real-estate focused firm. The increase in positive branding had a huge impact on the referral volume. "Within six months of using Track With Ease, we had TWICE the amount of referrals," says Egger. "We were able to add a whole new level of flexibility and efficiency to our already excellent services, and I know that Track With Ease had a lot to do with the impressions we were making on clients, and especially realtors who are a big referral source."

"It really sets up apart from other attorneys in the client communication and technology arenas," explains Egger. "My clients and agents love that they can just grab any document, invoice, survey, etc. without searching through their emails, or asking (and waiting) for me to forward. And they love that everyone is updated real time, before they even have to ask what's going on.

They just don't get that kind of service anywhere else, because it's impossible to provide without a tool like this."



Egger has received much glowing feedback from many real estate agents, including Nilsa Martinez at Coldwell Banker Liberty in Elizabeth, New Jersey. “The way she sends the documents with Track With Ease, it’s so great to get them that way because everything is on track, everything is in order, and it makes it so easy for me to save it and file,” says Martinez. “[Casey] is the first attorney to make my life this easy.”

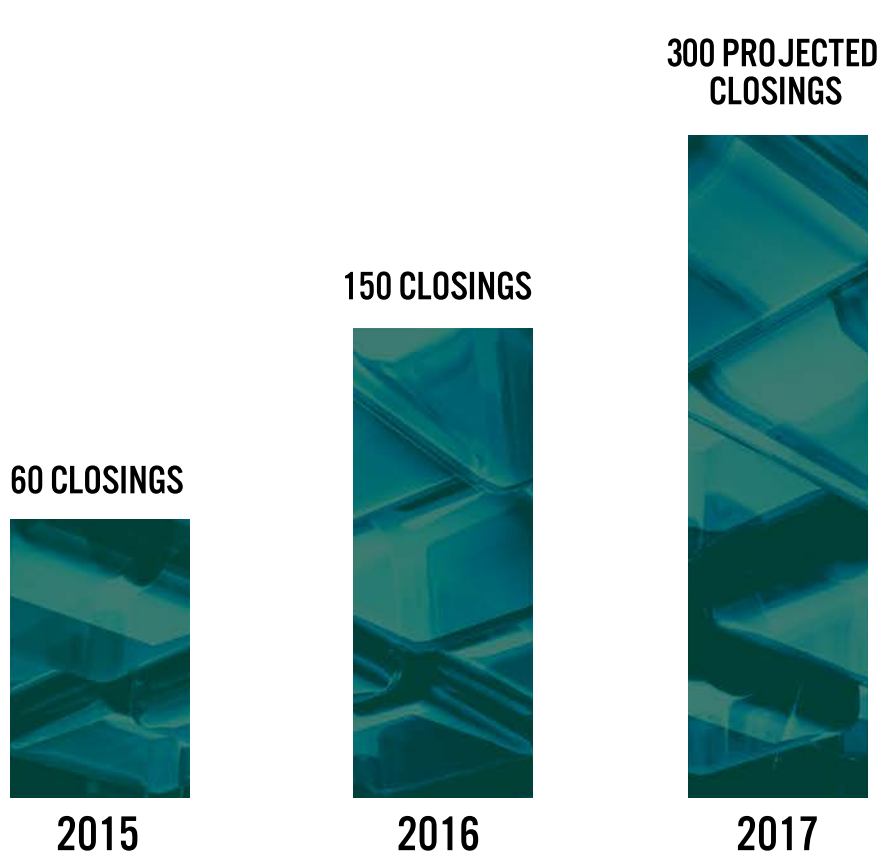
## CONTINUED HIKES IN REFERRALS AND REVENUE

Increased productivity and faster communication has made an impression on opposing parties as well. “Without violating the rules of ethics by communicating directly with the other side, the seller or the buyer, we can still show off our file organization and ease of communication with opposing parties,” explains Egger. “We have gotten no less than five new clients in the past six months simply by inviting them to tracks on transactions in which they were represented by other counsel.”

The highly referral driven nature of the legal field means that each and every referral is precious, and one client can be worth dozens of transactions per year. Egger and her team found that not only had referrals increased, but that incoming clients were more enthusiastic to work with them and that existing clients were more vocal in recommending them, particularly online.

“We had a huge increase in revenue in 2016, and we’re predicting to do even better this year,” says Egger. “2016 was amazing. At the same time that we were getting all of this new business, we were also better equipped to handle it and can now stay ahead, not just try to catch up which is what most attorneys are forced to do.”

## SHARP INCREASE IN TRANSACTIONS



## MORE DEALS WITH LESS STRESS

Avant Law Firm found that because of the increased productivity, they did not need to hire additional paralegals to handle the extra volume. But once the systems were in place, they chose to hire two additional support staff regardless. “We found ourselves with the extra money and wanted to turn our focus to continued growth,” says Egger, who achieved a major career milestone when she made partner at the start of 2017, one of the youngest attorneys in the state to reach this mark.

Since using Track With Ease, Avant Law Firm has seen a reduction of 40% in wasted billable hours that are lost on routine office drudgery. The bulk of the reduction has been in back-and-forth emails, sending reminders, updating clients, and collecting signatures. “Now with a well organized system and Track With Ease, there is less attorney involvement needed where paralegals can efficiently handle the basics. This means more billable hours on non-transactional matters and more time for in-person meetings and events.”

They’ve also seen a noticeable decrease in phone call volume, which is a huge time saver. “Clients are able to answer their own questions on the status of the file when they log into the portal, plus they get notified automatically even if they forget to log in. And they prefer it that way,” says Egger.





# FASTER TRANSACTION TIMES

"We're now able to close quickly on transactions," says Egger. In some cases, agreements which previously would have taken two weeks have now been reduced to just a couple hours.

All services run faster because time is shaved off at every step. "In addition to having more time in the office, the efficiency in the attorney review period is also in part due to having retainer agreements uploaded and signed within minutes, as no work can be performed on a client's behalf unless there is a signed retainer agreement." This increase in speed reflects positively on Avant Law's bottom line.

Experienced real estate clients definitely noticed the average 1 day attorney review period which was 5 times FASTER than the service they got at any other real estate law practice. Word started spreading and clients started not just giving more deals, but referring others.

## FASTER PROCESSES FOR EVERY PART INVOLVED

AVERAGE CONTRACT TO CLOSE (RETAIL) - 50 DAYS

AVANT LAW FIRM AVERAGE - 37 DAYS

AVERAGE CONTRACT TO CLOSE (INVESTOR) - 30 DAYS

AVANT LAW FIRM AVERAGE - 21 DAYS

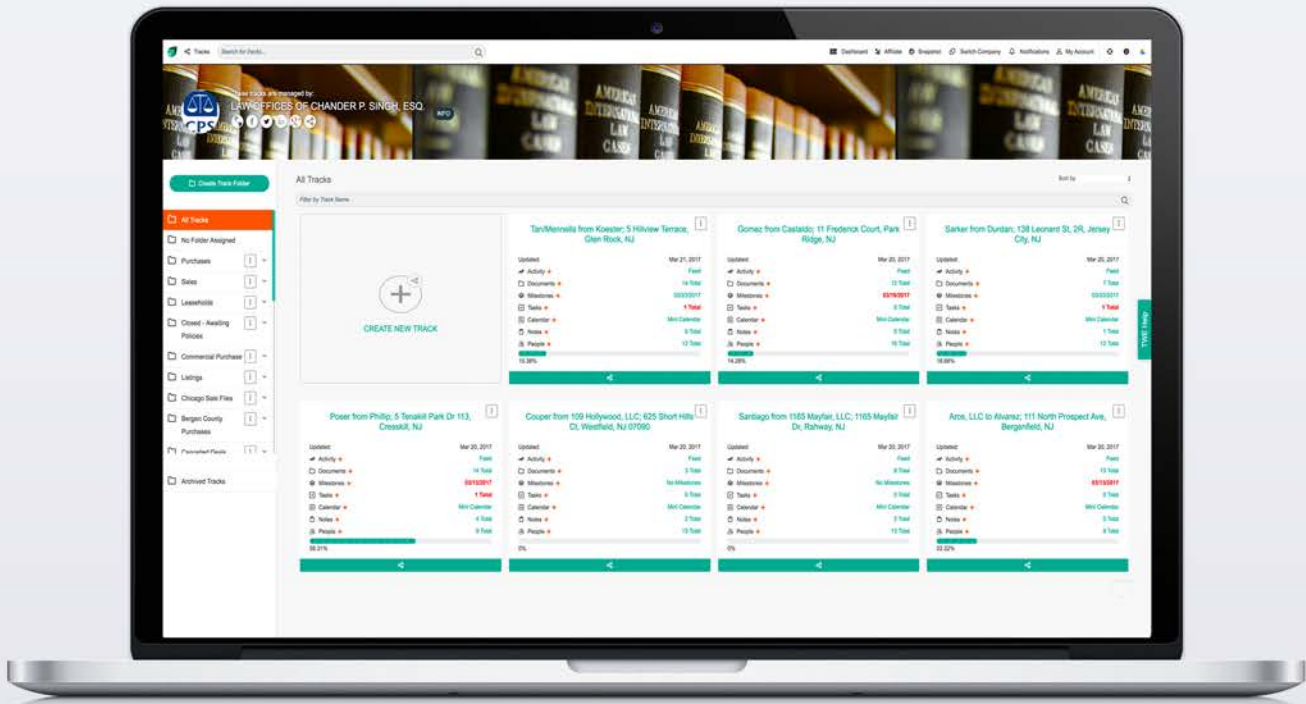
AVERAGE ATTORNEY REVIEW PERIOD IN NEW JERSEY  
- 4 BUSINESS DAYS

AVANT LAW FIRM AVERAGE ATTORNEY REVIEW  
PERIOD IN NEW JERSEY - 2 BUSINESS DAYS

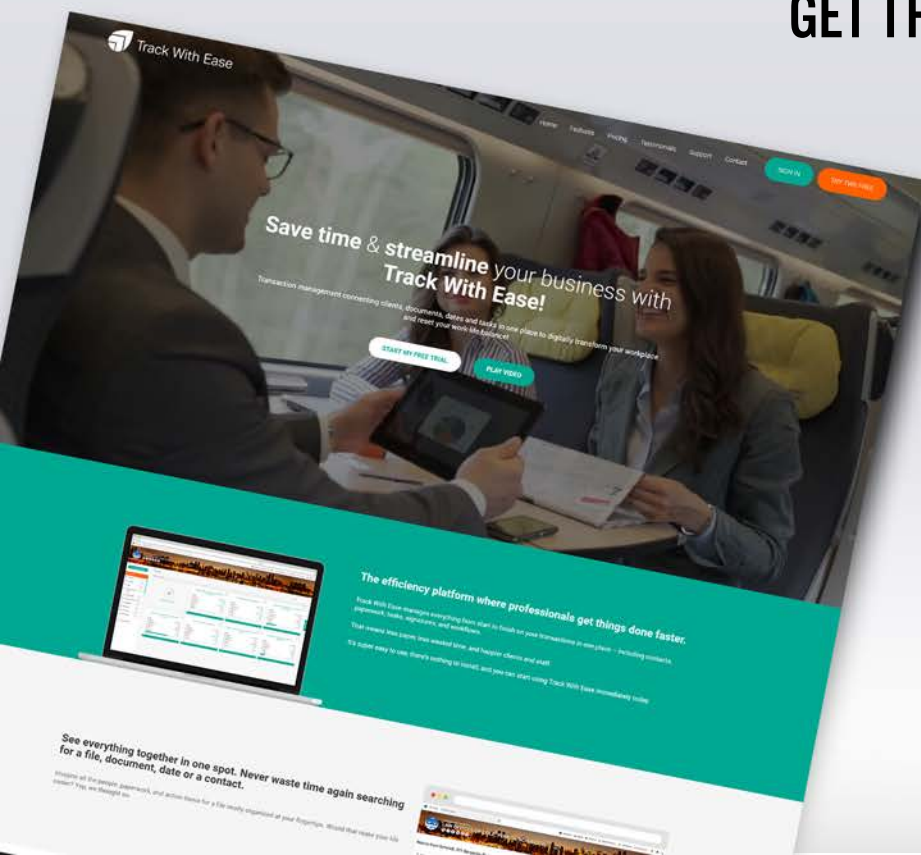
# SAVE TIME & STREAMLINE YOUR BUSY LAW PRACTICE TODAY

Track With Ease enables legal and real estate professionals to optimize their businesses with a transaction management platform built for maximum productivity.

**Start saving time today.**



## THE EFFICIENCY PLATFORM WHERE PROFESSIONALS GET THINGS DONE **FASTER.**



Track With Ease manages everything from start to finish on your transactions in one place – including contacts, paperwork, tasks, signatures, and workflows.

That means less paper, less wasted time, and happier clients and staff.

It's super easy to use, there's nothing to install, and you can start using Track With Ease immediately today.



# SEE EVERYTHING TOGETHER IN ONE SPOT. NEVER WASTE TIME AGAIN SEARCHING FOR A FILE, DOCUMENT, DATE OR A CONTACT.

Imagine all the people, paperwork, and action items for a file neatly organized at your fingertips. Would that make your life easier? Yep, we thought so.

## KEEP COMMUNICATIONS STREAMLINED. END THE BACK AND FORTH ONCE AND FOR ALL.

**Speed** is everything in your business. Now you can finally eliminate the hassles of sending emails, paperwork, revisions, and comments back and forth. Easily turn comments, questions, or to-do lists into tasks for others.

## IMPROVE YOUR QUALITY OF LIFE AND REDUCE YOUR HOURS STUCK IN OFFICE.

When you save 50% of the time you normally waste on paperwork and back and forth, you'll suddenly find half your time free. So go ahead... get home early for dinner, and now you can finally skip those late nights spent catching up on paperwork.



READY TO TRY  
**TRACK  
WITH  
EASE**  
FOR FREE?

OR, HAVE QUESTIONS AND WANT A DEMO?  
SIGN UP FOR A DEMO AT  
[WWW.TRACKWITHEASE.COM/DEMO](http://WWW.TRACKWITHEASE.COM/DEMO)  
OR SPEAK WITH OUR SALES DEPARTMENT AT  
(212) 203-7259

START TRIAL

SCHEDULE DEMO

