


# How this firm increased daily staff activity by 133%

Embracing Filevine as the tool of the firm, Leopold & Associates consolidated technology to manage cases, human resources, and vendors in a central location



**Practice Area:** Commercial and Residential Foreclosures, Bankruptcy, Evictions, Real Estate, Creditor's Rights

**Locations:** New York, New Jersey, Connecticut, Vermont, Pennsylvania

**Solutions:** Filevine, Periscope

[www.leopoldassociates.com](http://www.leopoldassociates.com)

Partner of Leopold & Associates, Jason Brooks represents clients and enjoys being the Filevine guru of the firm. A multi-state firm, Leopold & Associates represent mortgage servicers, banks, noteholders, and investors. They're a leader in their field as one of the largest loan servicers in the nation.



## The Challenge

Leopold & Associates were facing the challenge of handling the expansion and diversification of their business. To tackle the growth, they knew they needed a case management solution that was robust enough to fit their expanding practice.

As a mortgage and bankruptcy firm, the majority of Leopold's business lies in foreclosures. Their legacy system lacked customization options for workflows where they faced calendar issues, problems with accurate task flow assignments, and additional expenses on a database analyst to extract information and run reports.

Referrals up **4x**

Total firm activities increased **133%** per day

**25% of business activity** handled by a satellite team of three

With their focus set on a platform that would grow with the business, they turned to Filevine. Despite the industry regulations and pressures that came with COVID-19, the firm operates smoother than ever — remotely, with daily activity up over 100% — without the need for a technical staff member to run reports.



My attorney always says that having Filevine is just like having three other people working for you in the background at all times.”

## Leveraging Filevine across the entire business

1

**Automating the routine with Filevine Automation.** As someone who loves to tackle a challenge, Jason has created a custom solution for his firm between Filevine and Workato to further automate tasks. His build automates new referral case creation and uses logic to move cases along each phase to save his team time and reduce human errors.



I have completely automated our referrals. We no longer need an intake person to input the information. The referrals come in at a really high volume, and we had to be watching it all the time to get things on the calendar. Now it’s an incredibly pleasant experience to get a referral into the system and I don’t have to worry if it’s there or not.”

2

**Connected while apart.** Even though Leopold is a multi-state operation running amid a pandemic, they can still collaborate on projects and feel connected as a team. They’ve even been able to expand the business with satellite locations and no in-person training.



We remotely onboarded people and never really needed to bring them in for formal training. Despite this, they are representing a quarter of our daily activity within Filevine with just a small number of people.”

3

**Complete insight with Periscope.** Leopold uses Periscope to report on every segment of business from a macro and micro level. Some of Jason’s favorite custom reports are:

- a. Phase by phase case reporting
- b. Employee daily performance
- c. Activities performed by location



Within two weeks of using our reports in Periscope, we were really able to help our clients understand if there is a problem and be able to articulate what is going on in their case.”

4

**Leveraging Filevine to manage the entire firm.** “It’s a platform for you to design stuff. You can have case management in here, but there’s so much more you should be utilizing. **Your entire office can function in Filevine.**”

Jason has moved Leopold’s human resources and vendor management into Filevine, centralizing the firm’s tech stack. Additionally, he has tracked employee office visits in the platform to keep everyone safe through COVID-19. He loves the platform’s ease of use and is amazed at how it has transformed the business.

---

**See how Filevine can help your firm grow with a free demonstration.  
Call us at 801-657-5228.**

[filevine.com/leopold](https://filevine.com/leopold)