



CASE STUDY - WILHITE LAW FIRM

How This Law Firm Unified Five Departments Under One Central System

The Wilhite Law Firm used Filevine and Vineskills to speed up, automate, and improve their systems.



Website:
wilhitelawfirm.com/
Practice Area:
 Personal Injury
Location:
 Colorado and Texas
Optimizer:
 Shannon Wong

The challenge

The Wilhite Law Firm faced a set of interconnected challenges that were slowing its growth.

Despite having five talented departments, each was working in silos, with fragmented processes that made collaboration and visibility difficult. Their technology tools were powerful but underutilized, scattering data across platforms and preventing leadership from seeing the full picture.

Their goals were to:

- Unify workflows across departments.
- Build a single source of truth for all firm data.
- Automate repetitive processes to free up time and enable scalable growth.

The Wilhite Law Firm needed to align people, processes, and technology to achieve firm-wide coordination.

The solution

Vineskills partnered with The Wilhite Law Firm as a strategic guide, focusing on the building blocks of operational efficiency and automation.

1. Automating with Auto-Tasks

We began by helping the team harness Filevine's auto-task functionality to eliminate manual busywork.

When a case phase changes, the system now automatically generates a checklist of tasks, assigns them to the right people, and sets accurate deadlines — putting best practices on autopilot. No more missed steps, no more confusion mean clear accountability and consistent execution.

2. Smart Email Templates

Next, we optimized communication with smart email templates built directly in Filevine. Using dynamic field codes, each template automatically pulls in details such as the client's name or attorney's email address. Now, with a single click, team members can generate a perfectly drafted follow-up email that's accurate, personalized, and ready to send — turning a five-minute task into a five-second one.

3. Standard Naming Conventions & SOPs

We introduced standardized naming conventions for documents, making everything easy to find and track. Finally, we helped the firm develop Standard Operating Procedures (SOPs), formalizing their best practices into a repeatable, scalable blueprint for every automation and workflow.

The result

The transformation was firm-wide and measurable:

- **Unified operations:** The five departments now operate under shared workflows and standardized processes.
- **Full technology adoption:** With meaningful automations and SOPs in place, team members fully embraced the tools (achieving 100% user adoption!).
- **A single source of truth:** Data is no longer scattered. Leadership now has a clear, real-time view of caseloads, performance, and firm activity.
- **Efficiency and scalability:** With automation handling routine tasks, the firm has freed up time to focus on strategy, growth, and client service.

By combining process design, automation, and hands-on guidance, The Wilhite Law Firm turned disconnected systems into a cohesive, scalable operation that can support the firm as it grows.

This case study was created by [Vineskills](#). Vineskills offers support, training, customization, and implementation for Filevine customers.