

MORGAN & MORGAN

How Morgan & Morgan resolves Customer Cases 20% faster with Revenue Inbox

(formerly SmartCloud Connect)

by Brian Walsh, Senior Platform Analyst



15-20%

Increase in the number of processed cases

93%

Fewer clicks during routine work

+40-60

Extra matters per case staff



It's no longer about what a product can or cannot do.

It's about what the product team is willing to do to help

MORGAN & MORGAN

01

Challenges

Morgan & Morgan needed a synchronization tool for Outlook and Salesforce that would give attorneys, paralegals and case staff access to CRM records from Outlook. The solution would need to enable them to work more efficiently, increase CRM adoption, and cut time on admin tasks.

We were literally emailing the staff saying “hey, create a task to do this” or “hey, update this record.”

02

Implementation

With Revenue Inbox, Morgan & Morgan started using Salesforce to the maximum, inside the Outlook interface they are familiar with. We also tailored the product to their workflows and intricacies of the legal field as well as integrated it with SpringCM, the document system Morgan & Morgan use in their day-to-day.

It has been awesome with everything that Revenue Grid's team has done for us to match our requirements.

03

Result

Morgan & Morgan's top KPI was productivity, which they measure based on how many tasks per case a staff member can perform in one day. The company's attorneys praised Revenue Inbox for enhancing productivity, facilitating Salesforce adoption, and giving them measurable real-time results.

By using Revenue Inbox, we've found that there's a 20% increase in the number of cases that our case staff can handle. That's a big increase in productivity.