legalzoom®

Enhancing communication and performance with a modern and intuitive client portal

Delivering a secure and intuitive solution to a business that makes exceptional client experience its focus.

Revolutionising legal processes with new technologies

LegalZoom is a pioneering online legal technology company that provides incorporation, trademarking, and registered agent services, along with an array of online legal documents such as wills and living trusts.

BACKGROUND

LegalZoom specialise in a variety of legal services, and are well-known for embracing new technologies to offer clients, along with exceptional and unparalleled service. Legal firms are often viewed as anachronistic, failing to put their clients' needs first. LegalZoom's vision was to step away from this negative stereotype by offering their clients innovative, technology driven ways of interacting with legal information and processes, which would give them better visibility and reduce processing times.

Dotfive was tasked with creating both a conveyancing system and a client portal to help achieve this. The focus of this case study is the challenges and delivery of the client portal, a project that required us to provide security focused optimum user functionality.

CHALLENGES

Dotfive were originally commissioned to implement a new method of browser-based communications for clients, using WebRTC protocol, which was cutting-edge technology. This proved to be successful, and LegalZoom were so impressed with our technical knowledge and capabilities that they gave us the responsibility of managing all of their UK servers.

LegalZoom then requested us to build a prototype case management system in time for a key tender that they were applying for. After we successfully delivering their requirements on time and to budget, we were asked to expand this into a completely new, fully-functional client portal, which would cover all aspects of the conveyancing process.

A successful bespoke online conveyancing system and client portal would be an industry innovation. The recently-acquired Beaumont Legal, the third largest UK conveyancing firm, was the focus of the delivery.

We were tasked with delivering a fully modern customer experience, with a high-spec interface that allowed users to navigate with ease, whilst still providing the highest levels of security. LegalZoom's clients would primarily interface with conveyancers via the client portal, which was integrated with both the Beaumont Legal website and the case management system, called Zoom. Within this portal, a client may complete and securely submit a questionnaire, which would then automatically create a new case in the Zoom system for conveyancers to begin progressing. It was noted, however, that some clients may not wish to interact with the portal, preferring to provide their details via another method. To ensure these clients could still provide their information in a way that was most convenient for them, we also implemented direct case creation, which allowed customer services to directly create a case, or for offline paperwork to be submitted.

The integration was fully two-way, with Zoom updating the client portal as to case status and progress, and allowing clients and conveyancers to keep in touch using a real-time messaging system.

This was also implemented into a mobile app so that full communication connectivity could be achieved. These systems were part of an entire ecosystem of microservice-based architecture that we designed, created, implemented, and managed for LegalZoom.

Our attention to LegalZoom's needs, careful planning, and software engineering expertise ensured that we were able to deliver each project milestone on time, with all agreed functionality in place

These processes often involve complex interactions between tasks to progress cases to the key milestones of contract exchange and completion. The processes are also bound by strict compliance regulations, meaning that the devised solution would not only have to present the complex task processes in an intuitive manner, but would also have to ensure that any practices the system made available adhered to these compliance measures, which included comprehensive audit trails of all documents coming into and being sent out from the system. Close liaison with LegalZoom's stakeholders at Beaumont Legal was also required to ensure our developers correctly implemented the solutions they needed. We achieved this through conducting workshops to fact-find and try out features, and by having our business analysts stay in touch with the stakeholders at every step of the way.

The project's integration with third-party systems was critical to its success. This was due to the vital information that needed to be shared with HMRC and the Land Registry in order for successful, compliant completion of a property sale or purchase, as well as the various key searches that need to be carried out. We therefore developed bespoke integrations to interface with these third-party API.

The development of the Zoom conveyancing system would help set LegalZoom apart from its competitors, with technologically-controlled processes to maintain compliance, streamlined task management for faster case completions, and customisable communications functionality to strengthen client engagement.
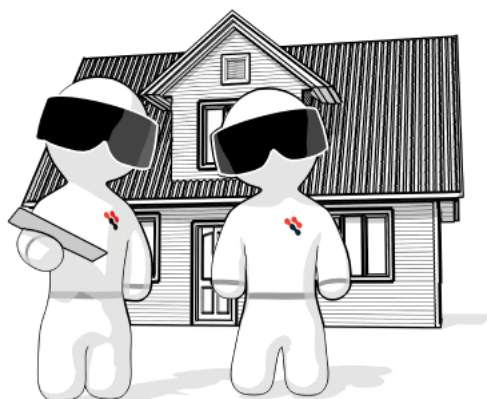
RESULTS

We supported the construction of an entirely new client portal, along with the customised and integrated rebuild of Beaumont Legal's existing client portal, that met LegalZoom's requirements perfectly. Security and access restrictions were vital to this project, especially as the system stores highly-sensitive identity and financial documents.

The new user-friendly interface enabled conveyancers to specify the generation of required communications upon completion of specific tasks, giving LegalZoom the freedom to control these configurations at their discretion.

Task statuses were also of key importance — as well as providing the user with an at-a-glance view of the task's progress, they also controlled the availability of subsequent tasks. Within the details of most tasks, users would also be presented with additional options to help them progress the case.

With a system as comprehensive as Zoom, we understood that new users may need guidance when using it for the first time. As part of the complete service we are dedicated to offering our clients, Dotfive created complete user documentation, detailing every aspect of the system's functionality, to help new users get the most out of Zoom, as well as running training workshops. This documentation was written in Markdown, which meant it could easily be presented to users within Zoom at logical points, as well as published in various formats, enhancing its utility.

Our attention to LegalZoom's needs, careful planning, and software engineering expertise ensured that we were able to deliver each project milestone on time, with all agreed functionality in place. Wherever possible we delivered ahead of schedule, giving users valuable extra time to test and approve the new functionality we had deployed.

Technologies used:

PHP   LARAVEL   MYSQL   RETHINK DB   JAVASCRIPT   NODEJS

PHP | Laravel | MySQL | MSSQL Server | RethinkDB | JavaScript | NodeJS | JSON | SOAP | XML | HTML | CSS
SASS | Bootstrap | Material | API | TDD | CI/CD

dotfive™

www.dotfive.co.uk

hello@dotfive.co.uk

+44 (0) 8456 808 805

+1 (307) 222 4842