23x Higher Than Expected Response Rates At Legacy Capital Services

Industry: Legal

Customer Since: 2023

Products: Enterprise Suite

Features: Forms, Portals, Doc Gen, Automation

COMPANY BACKGROUND

Legacy Capital Services is a servicing company for its sister practice, Elite Legal Practice, which helps consumers with debt-related legal matters.

It handles back-end operations, including customer service, client retention, legal document support, and technology, so Elite Legal Practice can focus on clients' legal cases and creditor or collector matters.

LEGACY CAPITAL SERVICE'S CHALLENGE

Legacy Capital Services uses Salesforce companywide to serve clients, access records, and review legal cases.

Collecting case information through phone and email follow-ups delayed attorneys and the documents team. Many clients are busy, less tech-savvy, or hard to reach, so it needed simple case detail and paperwork collection without logins, 2FA, or complex steps, plus flexible document generation to update client agreements as products and workflows launched, Salesforce-ready and scalable.

TITAN'S SOLUTION

Titan Enterprise Suite, training, and support let the team run its own Salesforce projects from day one.

Its Salesforce-native portal lets clients report creditor and collector contacts, upload texts, letters, and lawsuit paperwork for documents and legal teams, view debts and payment schedules, and answer a personalized, login-free questionnaire built for 20,000+ clients.

Titan also sends eSignature agreements and weekly affiliate commission emails.



KEY RESULTS

- **23% Client Response Rate:** The self-service case questionnaire achieved a 23% client response rate, exceeding the expected 1-2%.
- **New Pipeline Opportunities:** Questionnaire responses surfaced opportunities for casework that would not otherwise have entered the pipeline.
- **Clearer Visibility into Case Damages:** The team gained case-level insight to quantify damages and act on them more consistently.
- **Fewer Manual Follow-Ups:** The legal case portal simplified information collection across approximately 20,000 clients. Clients upload materials for attorneys to access, reducing manual handoffs in legal case management and the need for repeated calls and email follow-ups.
- **Automated Workflows for Salesforce:** Lawsuit documents arrive in the portal and Salesforce in real time, allowing attorneys to review case details and act sooner.
- **Projects Managed In-House:** Legacy Capital Services brought its Titan and Salesforce case management projects in-house, reducing reliance on external developers and enabling the team to manage automated communications and workflows internally.

"We needed something that would help us grow without getting in the way. We haven't been able to use Salesforce without Titan." - Elly Nunez, Vice President of Operations at Legacy Capital Services.