



Jubilee By the Experts

Exploring Workflows and Client Intake

March 16, 2022

Our Host – Dave Danielson

*CEO Resolvent, Student Debt Resolution Software
Former CEO of CINGroup/CINLegal/BestCase*

- Welcome
- The focus of our webinar series
 - Reduce software costs
 - Improve Operations
 - Integrate with Best of Breed



Our Experts – the team at SolventLaw



Jeffrey Bursell

Jeff Bursell has a proven record of leadership and obtaining great results for his clients. He has represented clients in bankruptcy for 20 years. Solvent was founded on a simple premise – financial hardships are difficult; however, the solution should not be difficult.



Trish Wolter

Trish is a well-versed bankruptcy paralegal with over 10 years helping bankruptcy clients through chapter 7 and chapter 13 bankruptcies. She has assisted clients at all stages of the bankruptcy process.



Kyleigh Stanek

Kyleigh has an extensive background in bankruptcy and brings a warm and caring attitude to clients' needs. With over 10 years' experience in helping clients with filing chapter 7 and chapter 13 bankruptcy,

To learn more about our guest speakers, visit <https://www.solventlaw.com/about/our-team>

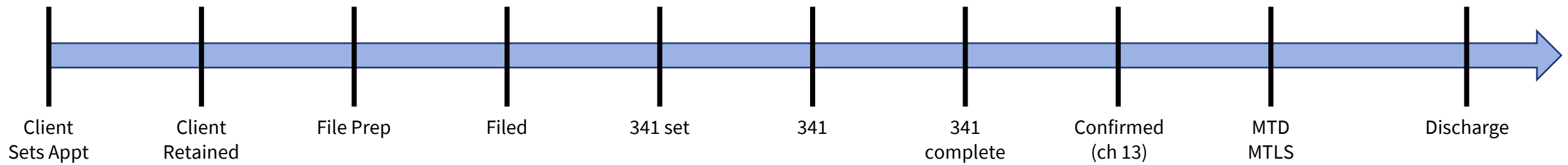
Agenda

- Exploring Workflows
 - Workflows Overview
 - Defining Workflows
 - Enabling Workflows in Jubilee
 - Reviewing Workflow Benefits
- Lexria Client Intake
 - Product Overview
 - Demonstration
- Ask the Experts

Workflows Explained

- Why should I care about Workflows?
- Why is Automation important?
- What is a workflow?

Timeline of a Case

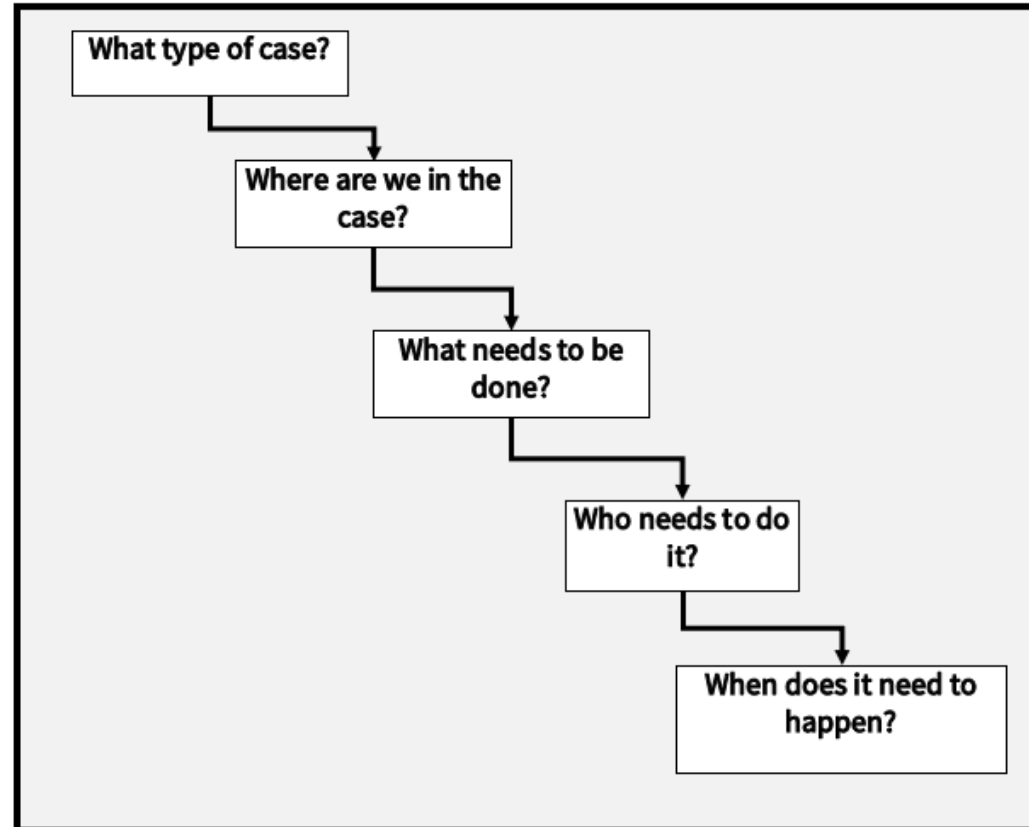


Workflow Elements

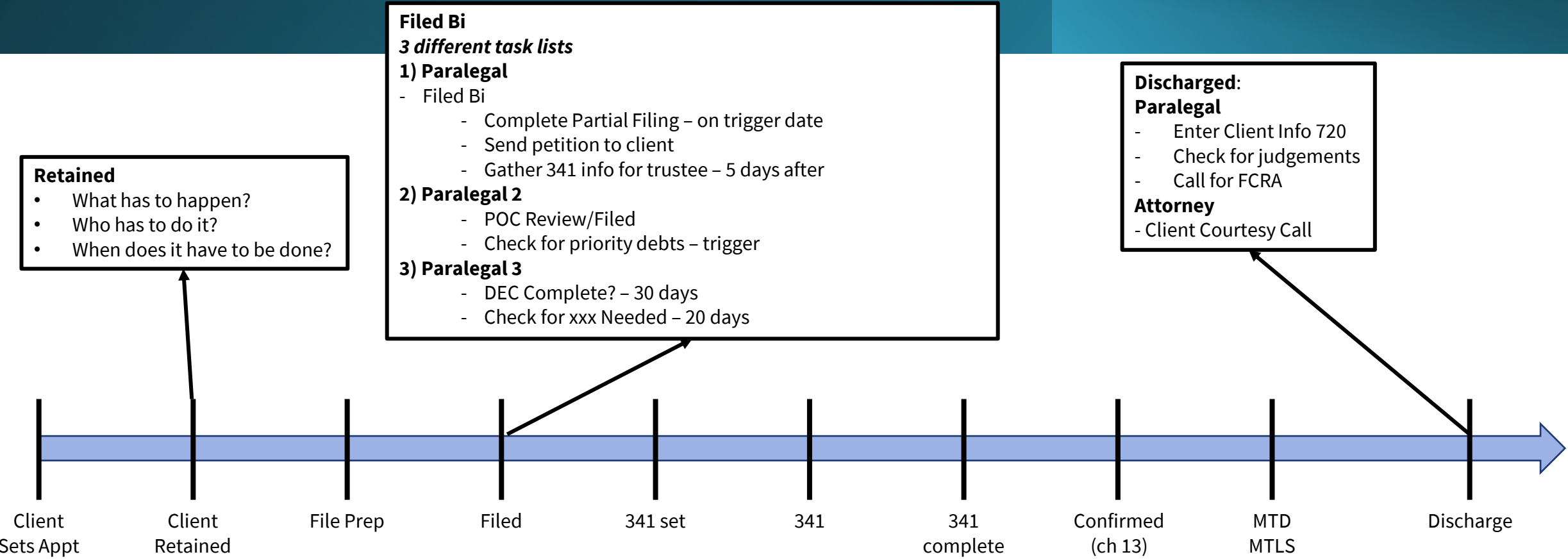
- Defining Workflows
- Consider All Case Types
 - Chapter 7
 - Chapter 11
 - Chapter 13
- Consider Debtor Type
 - Consumer
 - Business
- Add Task Templates
 - Users
 - Due Dates
 - Triggers
 - Open
 - Filed
 - Status Change
 - Workflow Change
- Add Tasks (items to do)
- Add Doc Request

Planning your Workflows

- Put Pencil to Paper – Build your workflows
 - Use the timeline graph to plan what happens at key case milestones
- Ask yourself...
 - What happens at each step?
 - Who should do the work?
 - When should the work be done?



Timeline of a Case



Workflow Summary

- Paralegal Perspectives on Workflows
- Benefits of Workflows
 - **Efficiency**
 - Staff spend less time recreating the same task, over and over again
 - Attorneys and staff can just focus on their daily task list instead of trying to remember what they have to do for the day
 - Spend more time on life instead of on your computer
 - **Cost Savings**
 - 8 tasks lists 1x a week X 15 cases @ 1 minute each is 120 minutes/week wasted
 - 120 minutes/2 hours saved X \$20/hour = \$40/week or \$172/month cost
 - Instead of wasting that \$172/month on doing something the program can do for you, the paralegal can do something to actually make money
 - **Protecting your Law License and Reputation**
 - You cannot remember everything
 - You cannot watch your staff every minute of the day
 - You need to focus on the important things (growing your business, making money)

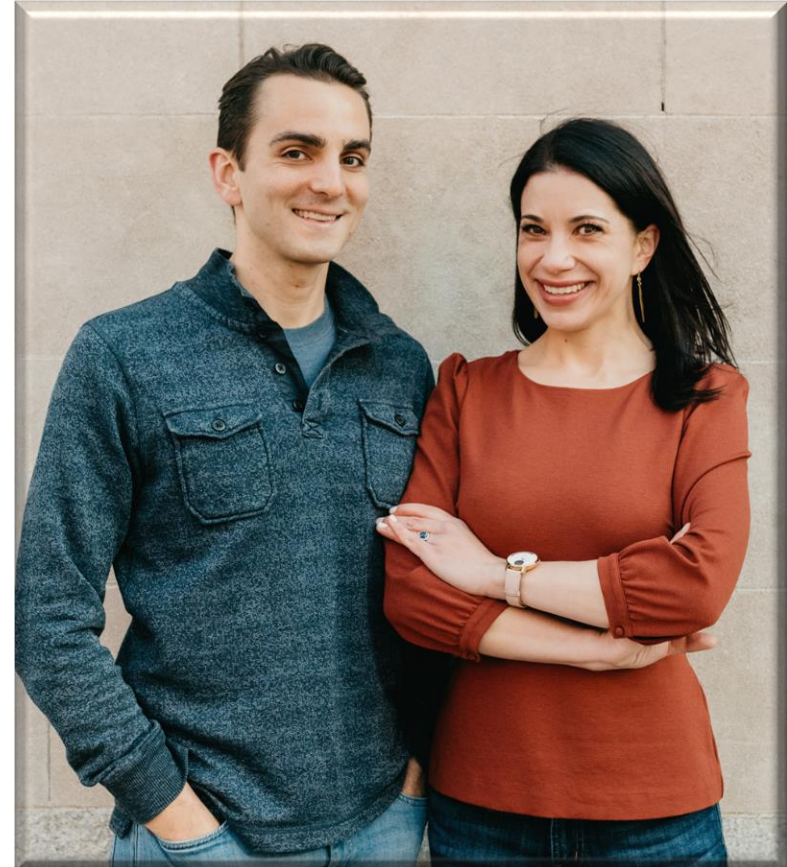
Jubilee “Best of Breed” Integrations





Bankruptcy Intake, Redefined

- Client Self Service for
 - Questionnaire
 - Asset Data
 - Credit Data
 - Payroll/Financial Data
 - Integration into Jubilee case file
- Leadership Team
 - Sally Rogers, CEO
 - Bennett Rogers, CTO





Clients/month	Cost/each
1-2	\$21.00
3-5	\$19.95 <i>5% off</i>
6-10	\$18.70 <i>10% off</i>
11+	\$17.85 <i>15% off</i>

PAY STUB SERVICE

Automatic pay stub retrieval for your clients

7 months of pay stub PDFs sent to your Inbox

Free to sign up

Your first client retrieval is free

**MODERN
BANKRUPTCY
INTAKE
TOOLS** 

LEXRIA 

THANK YOU

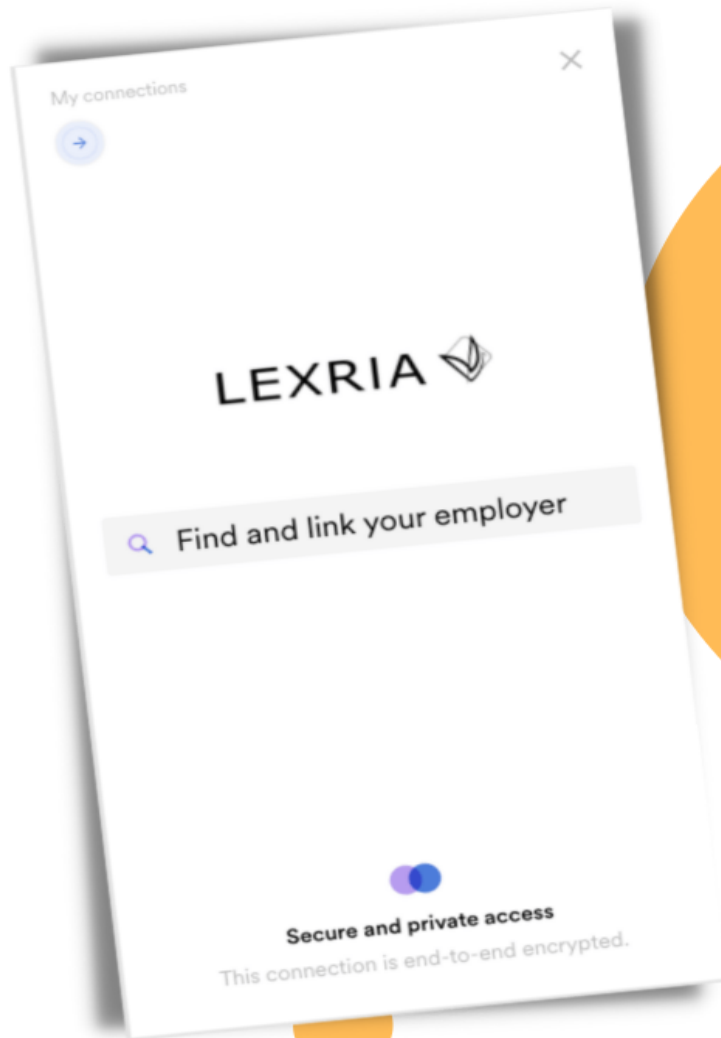
lexria.com | sally@lexria.com

Sign up today for free

Lexria Pay Stub Service

Lexria Intake

MODERN
BANKRUPTCY
INTAKE
TOOLS



Ask the Experts





Next Webinar: April 13, 2022 (2PM ET/ 1PM CT/11AM PT)

Future Webinar Topics to include:

- Certificate of Service Integration
- Flashdocs in Jubilee
- Chapter 11, Individual and Non-Individual
- Chapter 7 Non-individual
- Learning to use Documents
- Jubilee Payment Processing
- Improving cash flow with case financing