



SmartAdvocate Provides Efficient eSignatures with Docubee Partnership



SmartAdvocate®

Overview

SmartAdvocate, a fully customizable legal case management system, was searching for an unlimited eSignature solution to offer their clients.

By partnering with Docubee, they were able to find and implement the functionality they needed to help their clients thrive.

Challenges

SmartAdvocate has the robust features that enable legal professionals to manage, store, track and communicate like never before. The fully customizable, award-winning software company is no stranger to partnering with eSignature providers. However, litigation firms sending high volumes of documents to be signed began running into issues. "We had some clients reporting costs as high as thousands of dollars each month for just eSignature, nothing more," shared Allison Rampolla, SVP of Sales & Marketing.



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Challenges (cont.)

With this issue at the forefront of the SmartAdvocate Leadership Team's focus, they sought an eSignature API solution that could integrate into the SmartAdvocate platform, offering their clients unlimited eSignatures. It would enhance their experience, and make the document signing process more manageable. That's where their partnership with Docubee proved essential.

Upon finding Docubee, Allison was set up with a free trial of the product, and included key team members to test it before rolling anything out. "We wanted to make sure that the experience for the client was going to be a seamless transition from the eSignature partners they were currently using, or had used before," recalled Allison. *"I knew Docubee was going to be the perfect fit as soon as I started to use it for SmartAdvocate."*

Results

Docubee partnered with SmartAdvocate to build functionality that allowed SmartAdvocate clients to send out documents for signature without leaving the platform, or incurring surprise costs. In addition, the beauty of the integration enabled signed documents to be automatically saved into specific case files on the SmartAdvocate platform, which created a seamless experience for users. Docubee's simplified signing, along with client intake automation features allow SmartAdvocate clients to be more efficient than ever. Additionally, the unlimited eSignature component has given the SmartAdvocate team a competitive advantage in selling their software.



Everything is just faster. Faster signed documents means time saved for our clients to get new clients, which means more business and in turn, more revenue."

— ALLISON RAMPOLLA,
SVP OF SALES & MARKETING

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Results (cont.)

Getting this integration out required a quick turnaround time. The Docubee team worked hand-in-hand with Allison to set everything up, and were able to promote the launch at SmartAdvocate's annual user conference held in New York. Docubee's team was there in-person to meet and speak to SmartAdvocate clients, many of whom integrated with Docubee shortly thereafter. *"It's been a great partnership since, with many joint events, dinners, webinars with much more planned as we grow together,"* shared Allison.

With unlimited, efficient eSignatures in place, the SmartAdvocate team is working closely with their clients to explore new enhancements and future functionality that can be added to this collaboration. The partnership between Docubee and SmartAdvocate has helped accelerate growth, revenue, and client experience for SmartAdvocates clients.



For our clients, the proof is in the numbers as more than half of all of our clients that had eSignature have switched to Docubee and 90% of all new clients onboarded are opting in to having this new integration."

— ALLISON RAMPOLLA,
SVP OF SALES & MARKETING

About SmartAdvocate

SmartAdvocate is a fully customizable, legal case management system. The all-in-one software has built-in features and capabilities like intake, dashboards and reporting, document management, automation tools, artificial intelligence, and much more. Visit smartadvocate.com.

About Docubee

Docubee, an Accusoft brand, is an intelligent contract automation platform that lets businesses create, manage, sign, and track digital contracts in one secure platform. Docubee powers contracts by enabling users to gather vital customer data, create contracts using tools like generative AI or pre-built templates, and connect pieces of the process with dynamic workflows. Users can integrate Docubee with their existing site or platform via the API or connect to thousands of apps and CRMs using native and webhook-powered integrations. For more information, visit docubee.com.

