OneDesk

Customer Case Study

THE **FREELANCE** FIRM

The Freelance Firm is a legal outsourcing platform. It was founded in 2018 and is comprised of a network of freelance attorneys that provide comprehensive legal support to law firms on demand. The Freelance Firm's network of attorneys assist with research, drafting, deposition support, court appearances and other custom projects. These services are designed to make law firms more efficient, more productive and more profitable.

Challenge

Prior to August 2018, The Freelance Firm had used a different solution for their Project Management needs. However, it was lacking in customization options, which led them to seek out a more capable software.

Stephen Duane, Founder & CEO of The Freelance Firm said that they "Needed a solution that had a client-side portal; that could be branded and customized." In terms of user experience, Stephen wanted a seamless integration of the client portal on the website to ensure continuity and flow.

"The ability to integrate it so seamlessly and also the ability to customize it to give it a look that really mirrored the look and feel of the website was one of the early driving factors in making the decision to go with OneDesk."

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Solution & Results

In order to meet their goals, The Freelance Firm selected OneDesk as their Project Management and client support software solution. OneDesk serves as their client portal on the client side, and as a Project Management portal on the backend with their freelance attorneys.

When a new law firm registers with The Freelance Firm, Stephen creates a new customer account in OneDesk, and a project with their name. When a law firm submits a task, workflow automations route them to the correct law firm's project and assign them to the specified attorney on the project.

With OneDesk's features, Stephen noted there is "seamless communication" between both sides where the hiring attorneys and freelance attorneys are able to communicate about the project throughout its duration. Both parties are able to provide updates, answer questions, upload documents and receive email notifications on project updates. In addition, attorneys can conveniently log their time via the built-in work timers in OneDesk, allowing law firms to track the amount of time spent on each project as it progresses.

Each freelance attorney is assigned to an individual project so that they are only able to access the tasks to which they are assigned, thus creating a firewall. Furthermore, as new tasks arrive in the portal, they are automatically routed to the group of attorneys that meet the requirements for the project. This is divided by geographic location, area of expertise, and more. When it comes time to introduce new attorneys to the OneDesk platform, Stephen said, "It's a very easy onboarding process. Normally a 10-15 minute phone call and they're up and running."

Next Steps

As The Freelance Firm continues to grow its roster of expert attorneys, Stephen said he has more plans to add even more workflow automations to the various projects. When asked about recommending OneDesk, Stephen said, "I would certainly recommend the platform to anyone who has any type of Project Management needs. I think it has many uses and is very customizable. In terms of getting up and running, it's very user friendly."

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OneDesk Software Inc.

OneDesk combines Help Desk & Project Management software into a single application.

OneDesk includes customer-facing applications: real-time chat, customizable webforms, and a customer portal. These integrated applications allow you to serve your customers while conveniently working on your projects in one platform.

Powerful Help Desk & Ticketing

- Capture tickets by email
- Integrated chat and collaboration
- Capture project & service requests
- Customer portal & knowledge base
- Flexible, customizable, workflows
- Service Level Agreements

Versatile Project Management

- Views for traditional & agile project management
- Discussions & notifications on tasks & issues
- Reporting and exporting
- Gantt charts, scheduling, and assignments
- Time-tracking with timesheets & task timers
- Integrations for other applications you already use

Client

Custom Webforms

New Task

Automations

Notifications

Attorney

Gets to Work

Move and Assign

Project Assignments