



Regina W. Drennan, Esq.
Probate, Guardianship, Advocacy



From Friction to Flow

How We Helped Attorney Regina Drennan
Streamline Her Practice's Probate Document
Creation with Lawcus

Client: [Law Office of Regina W. Drennan](#)

The Challenges



Cost

Regina Drennan's small law firm was paying for Lawcus practice management software but wasn't seeing much benefit.



Inefficiency

Instead of using the software to streamline routine tasks, the team was still gathering information by hand, entering it into ***an outdated intake form***, and trying to merge it into ***poorly configured templates***. This often resulted ***in missing documents, incomplete information, and formatting issues***. Team members were copying, pasting, and formatting manually, which made preparing probate documents become a time-consuming and frustrating process.

Our Process



Discovery and Analysis

We met with the stakeholders to understand their needs. We listened to pain points and brainstormed what an ideal situation would look like. We then guided the team through exercises to collect and review examples of the documents to be generated. During this stage, we implemented standard operating procedures for meetings, communications, and document management. Before diving in, we conducted a review of their existing Lawcus implementation, including intake forms, workflows, and templates.



Configuration

We rolled up our sleeves and got to work bringing the vision to life. To do this, we leveraged the existing foundations in Lawcus and mapped the client's ideal state on top. This involved both in-platform configuration as well as offline work to format and prepare document templates.



Testing and Training

After thorough initial testing, we shared the new automations with the client for user acceptance testing. We guided them through how to use the new system and collaborated to refine the workflow, ensuring it met their needs and that they felt confident using it independently.

The Solutions



A Defined Process

We handed off a clear map of how data is collected, how conditional logic is applied, and which documents are generated for each use case. We also implemented a structured document management hierarchy with consistent naming conventions for easy organization.



Streamlined Intake

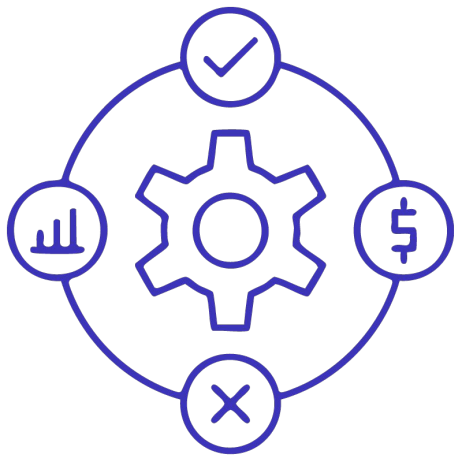
Intake now flows seamlessly through a simplified, user-friendly questionnaire that captures the right information in the right format right from the start. On the backend, this data is stored in custom fields for seamless integration.



One-Click Document Generation


Submitting the intake form is all it takes. The automated workflow analyzes the specific details of the matter, selects the appropriate templates, and merges in the relevant data. Attorneys instantly receive fully completed, properly formatted documents - ready for review and filing.

The Impact



- ✓ Decreased room for errors
- ✓ Improved ROI on practice management software costs
- ✓ Increased efficiency
- ✓ Time savings
- ✓ Reduced manual effort and administrative overhead
- ✓ Increased bandwidth for higher value tasks
- ✓ Reduced turnaround time from intake to filing

Technology Used

 **Lawcus** [Lawcus](#) Practice Management Software

Ready to Transform Your Own Operations?

Let's discuss how we can streamline your processes, maximize your software investment, and free up your team's time for higher-value work.

Contact hello@escapevelo.city