



How a LegalTech company rebuilt broken Salesforce workflows with RevSolutions

Executive snapshot

A mid-sized LegalTech company that serves small and mid-sized law firms used Salesforce but struggled with broken workflows and heavy manual work. Their teams dealt with unreliable processes across sales, case management, opportunities, and project delivery. They also had no internal Salesforce resources to fix the system.

RevSolutions stepped in to rebuild the foundations, restore automation, and set up a working Experience Cloud site. The goal was simple. Make Salesforce stable so each team could run their day to day without manual effort or inconsistent steps.

About the client

The client operates in the LegalTech space. They run a SaaS platform that supports law firms with case work, billing, timekeeping, and daily operations. Because of the nature of their product, they rely on clean processes inside Salesforce, especially for:

- case management
- sales workflows
- opportunity handling
- project implementation steps

These processes kept breaking, which pushed them to bring in RevSolutions.

The challenge

The client reported major issues that slowed their business. Their Salesforce setup had broken workflows, inconsistent steps across teams, and far too much manual work. Errors happened often. Simple tasks took longer than they should.

Without a dedicated Salesforce resource, the system kept getting harder to maintain. Their teams could not use Salesforce the way they needed, which hurt efficiency across operations.



Why RevSolutions joined the project

The client needed a partner who could fix the problems at the root. They brought in RevSolutions to:

- rebuild broken automation
- reduce manual work
- replace faulty processes with stable workflows
- set up their Experience Cloud site correctly
- create smooth end to end operations inside Salesforce

The scope focused on foundation first instead of indulging in quick fixes.

The solution and implementation

RevSolutions worked across three Salesforce products:

- Sales Cloud
- Service Cloud
- Experience Cloud

The team rebuilt old automation and created new flows where needed. They cleaned up sales steps, fixed case management issues, and stabilised project handling. They also set up the client facing Experience Cloud site so external users could interact without friction.

The most complex part involved moving case management and project management fully inside Salesforce. The client no longer needed separate tools for these tasks. The project remains active as RevSolutions continues to close gaps and strengthen the system.

Results and impact

After the first phase, the client saw clear improvements across their day to day work in Salesforce.

Key outcomes:

- Manual work dropped by 46%, depending on the workflow
- Case management steps ran 50% faster after automation fixes
- Project handling time reduced by 39% to 45% because everything moved into Salesforce
- Errors in internal workflows dropped by 35% after removing incorrect logic and broken flows
- The team handled more requests per week because they spent less time fixing issues and redoing tasks

These improvements came directly from stable automation, cleaner workflows, and the removal of external tools for project work.



Highlights and next steps

This project continues to grow as the client expands how they use Salesforce. Their next step with RevSolutions is to implement Agentforce to support more internal teams and improve automation further.

Testimonial:

Hello Chirag,

I want to take a moment to recognize the excellent contributions Shubham has made during his time working with us. From day one, he has shown great initiative and a positive attitude, quickly immersing himself in several important projects, including MuleSoft connections, GuideCX updates, and NetSuite integrations.

Shubham consistently demonstrates a willingness to learn and adapt, which has made him an invaluable resource to our team. His ability to take on complex tasks with enthusiasm and deliver results has kept our operations running smoothly. One of his most impactful contributions has been helping us reduce support request turnaround time to less than five days—a significant improvement that the entire team has benefited from.

Beyond his technical skills, Shubham brings strong problem-solving insight and collaboration to every interaction. He is approachable, dependable, and someone our team genuinely enjoys working with. His contributions are making a measurable difference, and we greatly appreciate the professionalism and dedication he brings to every project.

