

# Seeing the Light: Petosa Law's CaseAware® Implementation



## Petosa Law LLP

Founded in 1970, Petosa Law LLP provides legal services to mortgage lenders, servicers and real estate professionals in the state of Iowa. The firm, focused since 2003 on the default servicing industry, supports clients in the areas of foreclosure, bankruptcy, loss mitigation, eviction and post-foreclosure closing coordination.

When the firm's 2013 CaseAware® implementation stalled, Petosa turned to the default services team at Affinity Consulting for help.

### THE CHALLENGE

By 2013, Petosa's 10-year-old Microsoft Access-based case management system was ready for retirement. As part of an initiative to better leverage technology to streamline workflows and ensure quality, Petosa purchased CaseAware®, a case management system designed specifically for firms in the default services industry, and began laying the groundwork for rollout.

"In our proprietary system, nothing was connected," says Lynn Carlson, Petosa's long-time Office Administrator. "Billing was separate from process was separate from document preparation—they were all in different modules."

CaseAware® offered the ability to create end-to-end workflows in one place and would give Petosa better control over document quality, particularly important in the face of the slower market's increased regulatory scrutiny. As implementation discussions progressed, however, it became clear that some outside help was needed.



**"We'd been working for several months, and we'd started developing sequences... but it just wasn't going anywhere," explains Carlson. "We'd had a similar experience with [another product] in 2010, and we were not anxious to repeat it, so we made the decision to hire a consultant."**





**“WHAT I SAW BEFORE WORKING  
WITH ERICA WAS A ‘FLAT’ PICTURE,”  
SAYS CARLSON.  
“ERICA MADE THE PICTURE 3-D.”**

## THE SOLUTION

Petosa began to research consulting firms that could implement CaseAware® and discovered Affinity Consulting Group, a well-known company with a long list of CaseAware® clients.



**“Speaking with some of those clients is what really convinced me,” says Carlson. “We were going to need Affinity’s help or we were never going to get CaseAware® implemented.”**

Erica Fujimoto, Affinity’s Director of Default Services, quickly convinced Carlson that her attendance at Affinity’s CaseAware® Bootcamp, an annual training event for CaseAware® administrators, would be the ideal first step toward a successful implementation. Bootcamp provided Carlson with a much deeper understanding of the product and the skills she needed to take a more active role in tailoring CaseAware® to Petosa’s needs. Subsequent meetings with Fujimoto yielded even more clarity.

“What I saw before working with Erica was a ‘flat’ picture,” says Carlson. “Erica made the picture ‘3-D.’ As I watched Erica doing our process mapping, and I began to understand how something she put on Line Z was affecting what was on Line A, CaseAware® started to make a lot more sense.”

With Affinity’s help, Petosa successfully rolled out CaseAware®, provided in-depth training, and secured staff buy-in, resulting in precisely the efficiency and quality gains the company had hoped for when investing in the product.



**"CASEAWARE®  
ALLOWS US  
TO DO MORE  
WITH LESS,"**



## THE RESULTS



"In CaseAware®, everything just 'talks to each other,'" says Carlson. "We don't have to have separate people requesting checks or processing the invoices... it's all right there."

As the default services industry continues to weather a downturn, Petosa is confident in its ability to thrive thanks to a streamlined business model that emphasizes quality.

"CaseAware® allows us to do more with less," Carlson explains. "We're going to stay in this industry and stay specialized. Everything looks good for staying steady and holding our own. And quality is something we can always sell."

Seven years after its first engagement with Petosa, Affinity remains a trusted advisor and technology partner. Fujimoto recently completed an on-site engagement in which she helped to optimize Petosa's workflows, removing bottlenecks and creating redundancy that allows business to operate smoothly even when key employees are absent.

Carlson's advice for other firms considering CaseAware® or struggling with implementation challenges? "Having Affinity on-site when we implemented was just the only way to go," she says. "Affinity can see the big-picture solutions, and we just can't do that by ourselves. Our experience with them has been excellent."

## ABOUT AFFINITY CONSULTING GROUP

At Affinity Consulting Group, we inspire, enable, and empower legal teams of all sizes to work smarter. Our holistic approach incorporates people, process, and technology. Our passionate, well-connected industry experts work hand in hand with you to help you better understand and optimize your business—from software to growth strategy, and everything in between. Our vast network of partners and deep industry expertise ensure that we can deliver cost-effective, custom-tailored solutions to even your toughest business challenges. If we don't do it, we know someone who does. Please visit our website to learn more: <http://affinityconsulting.com>