

CASE STUDY

10,000 people called for legal help. The system tracking them was a spreadsheet.

Civil rights organizations handle inquiries from people in crisis. When that intake process runs on shared email inboxes and spreadsheets, cases get lost, follow-up doesn't happen, and the people who need help most are the ones who fall through the cracks.

Does this describe your legal or advocacy organization?

- Intake is handled through a shared email inbox with no case tracking
- Staff in different offices can't see each other's cases or clients
- Response times vary from same-day to weeks, with no consistency
- Community events are coordinated through spreadsheets and email chains
- You can't tell funders how many people you helped or what happened to them
- Duplicate intake happens when the same client contacts multiple offices

What Armely built for Lambda Legal

Lambda Legal manages 10,000+ annual helpline inquiries across six regional offices. Before Dynamics 365, intake lived in shared email, cases were tracked in spreadsheets, and regional offices operated independently with no shared visibility.

Armely implemented Dynamics 365 Customer Service for unified intake and case management, integrated with Field Service to coordinate attorneys and advocates across 280+ annual community events. Response time dropped 65%. Outreach capacity increased 40%.

Before	After
10,000+ annual inquiries managed across spreadsheets and shared email inboxes	All inquiries create cases in Dynamics 365; 15-minute automated acknowledgment
72-hour average response time to helpline inquiries	25-hour average response time (65% reduction)
30% of inquiries fell through cracks without follow-up	95% follow-up rate with automated reminders and escalation workflows
Six regional offices operated in silos, no cross-office visibility	Complete visibility across all six offices; national case coordination enabled
200+ community events coordinated via spreadsheets and email	280 events annually via Field Service scheduling optimization (40% increase)
No demographic or impact data available for funder reporting	Real-time dashboards and automated funder reports from live system data

Book a free Dynamics 365 assessment for your legal or advocacy organization

We look at your intake, case management, and outreach coordination and show you what a unified platform would deliver. armely.com | info@armely.com | 972-460-0643