



Case Study: Transforming Lundy Law Practice

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Client Name: Lundy Law Practice

Industry: Law

Lundy Law Practice is a law firm known for its commitment to providing exceptional legal services. However, it faced significant challenges related to its administrative support systems. The existing team was unmotivated, and the lack of a structured operational framework hindered efficiency.

Challenges Faced

1. **Ineffective Administrative Support:** The firm struggled with a disengaged administrative team that lacked direction, leading to inefficiencies in day-to-day operations.
2. **Absence of Standard Operating Procedures (SOPs):** Without documented processes, tasks were completed inconsistently or not at all, causing confusion, delays, and potential errors.
3. **Underutilization of CRM:** The firm had invested in MyCase, a customer relationship management system designed specifically for attorneys to streamline operations. Unfortunately, it was underutilized, with most tasks performed manually.

Solution Implemented

To address these challenges, Jenn Mullen from Beachcomber Business Solutions collaborated closely with Lundy Law Practice, implementing a systematic approach that included the following key actions:

1. Development of Standard Operating Procedures:
 - a. Jenn recommended the creation of comprehensive SOPs to define and standardize key processes within the firm.
 - b. These SOPs were meticulously documented, detailing the purpose, step-by-step processes, necessary resources, frequently asked questions (FAQs), and key performance indicators (KPIs) for measuring effectiveness.
 - c. Four core processes were documented, enabling the newly hired administrative team member to integrate seamlessly into the firm's operations.
2. Optimizing CRM Utilization:
 - a. With the foundational SOPs in place, Jenn introduced strategies to encourage the use of MyCase. These included implementing templates for engagement and disengagement letters, as well as standardized contracts.



- b. By centralizing this information within the CRM, administrative staff had easy access to necessary documents, which reduced the time spent searching for resources and improved overall efficiency.
3. Automation of Workflows:
 - a. After establishing the SOPs and optimizing the CRM, Jenn identified opportunities for automating repetitive tasks.
 - b. Using Zapier, Jenn set up a connection between Calendly and MyCase. This integration ensured that once a consultation was booked on Calendly, a lead was automatically created in MyCase.
 - c. Furthermore, additional Zaps were configured to update lead statuses, thus ensuring that the CRM reflected real-time information about client interactions without manual intervention.

Results Achieved

The collaboration between Lundy Law Practice and Beachcomber Business Solutions yielded impressive results:

- Increased Efficiency: By implementing SOPs, the administrative team was no longer operating in a vacuum. Tasks were completed more consistently and accurately, leading to improved client interactions.
- Enhanced CRM Utilization: With templates and clear guidance on using the CRM, the firm transitioned from manual processes to a more streamlined, organized methodology for client management.
- Reduced Administrative Workload: Automation of repetitive tasks significantly decreased the administrative burden on the team, allowing them to focus on higher-value activities.
- Improved Team Morale: As the administrative team members began to work with a structured system and clear processes, their engagement and motivation improved, fostering a more positive workplace culture.

Conclusion

The case of Lundy Law Practice demonstrates the transformative impact of structured processes and technology in a legal setting. Through collaboration with Beachcomber Business Solutions, the firm overcame operational challenges and enhanced its efficiency, setting a solid foundation for future growth. This initiative not only improved internal operations but also positioned Lundy Law Practice to deliver even better service to its clients.



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