MitiRisk + Google Vs CRM

Building MitiRisk on a **Google Workspace Enterprise Plus** foundation isn't just a technical preference; it is a strategic move that **transforms your office suite into an Automated Legal Factory**.

By leveraging the "Plus" features, a firm can effectively **replace a traditional CRM for transactional law**, as the tools provided in this tier offer the logic, reporting, and security required to manage a high-volume practice without additional third-party software.

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*"Why pay for five separate subscriptions to move data from a client's brain to your firm's vault? MitiRisk is the first **Stateless Orchestrator** that replaces the 'Franken-stack' of CRM, Drafting, and E-Sign with a single, secure logic flow."*

MitiRisk can replace or significantly reduce the cost of several categories of software. Because MitiRisk handles the "Intake → Pay → Orchestrate → Vault" flow, you can make a strong case for replacing the following subscriptions that attorneys currently "cobble together."

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1. Legal CRM & Intake Software (Partial/Whole Replacement)

Common Apps: *Lawmatics, Clio Grow, DecisionVault.*

- **The Case for MitiRisk:** These apps charge $100–$200/month just to collect data and move it to a case management system.
- **The Displacement:** MitiRisk acts as the "Intake Engine." If an attorney only uses these CRMs to gather data for drafting, MitiRisk's **stateless intake** replaces the need for a separate, expensive CRM. You move the client from "interested" to "delivered" without the middle-man software.

2. Standalone E-Signature & Document Portals

Common Apps: *DocuSign, HelloSign (Dropbox Sign), Citrix ShareFile.*

- **The Case for MitiRisk:** Attorneys pay for these to send documents for signature and then *manually* download them to upload to their vault.
- **The Displacement:** MitiRisk can integrate the signature step into its orchestration. Instead of paying $30+/user for DocuSign, MitiRisk's flow pushes the final, signed document directly into the **NetDocs/Google Vault**. You eliminate the subscription fee and the manual "Save As" labor.

3. General Document Automation Tools

Common Apps: *HotDocs (Advance), Gavel (formerly Documate), Lawyaw (Clio Draft).*

- **The Case for MitiRisk:** These tools are often "stateful"—they want you to log in, save your work in their cloud, and build complex templates on their platform. They are expensive (HotDocs can be thousands per year).
- **The Displacement:** MitiRisk replaces the *need* for these proprietary platforms by using a **stateless JSON-to-Base64** engine. For a transactional attorney, MitiRisk provides the same "fill-in-the-blank" automation but without the heavy overhead and the risk of having data "trapped" in a third-party's stateful database.

4. Client Onboarding & Payment Bridge Tools

Common Apps: *Gravity Legal, LawPay (specifically the "Pay-to-Onboard" features).*

- **The Case for MitiRisk:** Many firms use these just to trigger a "New Client" workflow once a retainer is paid.
- **The Displacement:** MitiRisk *is* the bridge. By tying the payment (Stripe/LawPay) directly to the **Instrument Orchestration**, you remove the need for "Zaps" or third-party workflow builders like Zapier ($30–$100/mo) that connect payments to folders.

5. Specialized "Vault" or Client Portal Add-ons

Common Apps: *Clio for Clients, MyCase Portal.*

- **The Case for MitiRisk:** Attorneys often pay for "Complete" tiers of practice management just to get a secure way to share documents.
- **The Displacement:** Since MitiRisk orchestrates directly into **NetDocs or Google Drive**, the attorney can use the *native* sharing features of those platforms (which they already pay for) to give clients access. MitiRisk removes the need for a secondary "Legal Portal" subscription.

The "Subscription Killer" Summary Table

Legacy Subscription	**Monthly Cost (Est.)**	**MitiRisk Advantage**
Lawmatics / CRM	$199+	MitiRisk handles the intake logic without the CRM bloat.
DocuSign	$40/user	MitiRisk orchestrates the signature into the final vaulting step.
HotDocs / Gavel	$80–$250	MitiRisk uses **stateless JSON** to generate docs without "locking" your templates.
Zapier (Pro)	$30–$100	MitiRisk has the "Logic" built-in; no third-party glue needed.
Total Potential Savings	**$350 - $600 /mo**	**MitiRisk replaces the "Franken-stack" with one flow.**

VS THE CRM

For Litigation Firms:

"Your CRM is a great library for your lawsuits. MitiRisk is the automated factory for your deals. Use the library to store the history, use the factory to build the future."

When a firm already has a CRM for litigation (like Clio or Lawmatics), the mistake is trying to force "transactional pegs" into "litigation holes."

Litigation is **event-driven** (court dates, discovery, motions), while transactional work is **document-driven** (logic, orchestration, vaulting). You don't need to tell the firm to delete their CRM; you tell them to **decouple their workflow**.

Here is the strategic benefit for MitiRisk in a multi-practice firm:

1. The "Clean Room" (Security)

Litigation files are often "dirty"—full of messy discovery, evidence, and third-party documents. Transactional files (Wills, Trusts, Contracts) must remain "pristine" and high-integrity.

- **The Benefit:** "Keep your CRM for the chaos of litigation. Use MitiRisk as a **Clean Room Orchestrator** for your transactional matters. By keeping these flows separate, you ensure that sensitive estate instruments aren't buried under 5,000 pages of litigation discovery."

2. The "Administrative Tax" (Profitability)

Litigation is often billed by the hour, so manual work in a CRM is "billable time." Transactional work is increasingly **flat-fee**. Manual work here is a "tax" on the firm's profit.

- **The Benefit:** "In litigation, your team bills for the time they spend managing the CRM. In your flat-fee transactional work, every minute spent dragging a PDF into a folder is money coming out of the partner's pocket. MitiRisk automates the 'Admin Tax' that your litigation CRM isn't built to handle."

3. The "Light vs. Heavy" Hybrid Model

Litigation requires a "Heavy" CRM (tasks, timelines, court rules). Transactional needs a "Light" Orchestrator.

- **The Benefit:** "Don't overcomplicate a simple Trust. Use your CRM for the 2-year litigation cases. For the 30-day transactional matters, use MitiRisk's **Stateless Flow**. It feeds the data into your Google-based reporting (Looker Studio) so you can see your transactional revenue separately from your litigation billing."

How the Integration Works (The "Two-Way" CRM)

If they must keep their CRM for a single "source of truth," MitiRisk can still act as the engine under the hood.

User Action	**MitiRisk Action**	**Result in Litigation CRM (Clio/Lawmatics)**
Client Pays	Triggers Orchestration	MitiRisk pings the CRM API to "Close" the lead.
Doc Generated	Assembles Instrument	MitiRisk uploads the PDF to the CRM's "Documents" tab automatically.
Vaulting Done	Pushes to NetDocs/Google	MitiRisk adds a "Note" in the CRM: "Matter Vaulted - [Link]"

ADVANTAGES OF GOOGLE SUITE

Other than you're already paying for the Google Enterprise Plus that includes everything you need…

To replace a CRM while staying entirely within the Google ecosystem, you leverage **Google Workspace** not just as a set of office tools, but as a modular database and reporting suite.

MitiRisk acts as the "Data Injector" that turns these static Google tools into a dynamic, automated system.

The Google "CRM" Stack for MitiRisk

By combining these four Google tools, you create a system that rivals high-end CRMs without the monthly per-user fee:

Google Tool	CRM Functionality Provided	MitiRisk Integration
Google AppSheet	**Step-by-Step Tracking & UI:** Provides a mobile/web app interface to view "Active Matters" and update status buttons.	MitiRisk pushes the "Intake" data into the Sheet that powers the AppSheet UI.
Looker Studio	**Advanced Reporting:** Visualizes "Who owes what" and "Case Load" through professional dashboards.	Connects directly to your Google Sheets to create real-time charts.
Google Sheets	**The Central Database:** Stores all raw data, payment status, and metadata.	The "Stateless" destination where MitiRisk writes the record of every transaction.
Google Apps Script	**Automation & Notifications:** Sends automatic emails or Slack pings when a task is overdue.	Triggers custom logic after MitiRisk completes a "Vaulting" operation.

1. Tracking "Who Owes What" (Reporting)

Instead of scrolling through a sheet, you use **Looker Studio** (formerly Google Data Studio).

- **Function:** You create a "Financial Dashboard." It pulls from your "Payments" column in Google Sheets.
- **The Benefit:** You can filter by "Overdue" or "Pending" with one click. It looks and acts like the dashboard in Clio or Lawmatics but is free with your Workspace account.

2. Step-by-Step Tracking (Workflow)

To get the "CRM feel" without the price, use **Google AppSheet**.

- **Function:** AppSheet turns a Google Sheet into a functional app for your phone or desktop. You can have a "Status" column with a dropdown: *Intake → Drafting → Review → Vaulted.*
- **The Benefit:** Your paralegals can click a button in the app to move a case to the next stage. It’s much cleaner than typing in a cell.

3. Replacing CRM Communications

One thing Google Sheets can't do natively is track every single email sent to a client.

- **The Fix:** Use a Google Workspace extension like **Shared Contacts** or **Mail Meteor**.
- **MitiRisk Role:** Since MitiRisk is stateless, it can "BCC" a specific administrative email or log the outreach event directly into your Google Sheet "Interaction Log" every time an instrument is vaulted.

How MitiRisk Makes This "Stateless" CRM Possible

The biggest weakness of using Google Sheets as a CRM is **manual data entry**. MitiRisk solves this:

1. **Automated Entry:** As soon as a client pays and MitiRisk orchestrates the documents, it writes a new row to your "Master CRM Sheet."
2. **Stateless Trigger:** MitiRisk can trigger a **Google Apps Script** that creates a calendar event for the follow-up or sends a "Thank You" email automatically.
3. **Vault Linking:** MitiRisk can write the *direct link* to the Google Drive folder into the CRM row, so you can open the client's documents directly from your reporting dashboard.

The Case for "The Google Way"

- **Security:** Your data stays in your firm's Google account, not a third-party CRM's database.
- **Cost:** You likely already pay for Google Workspace. Looker Studio and AppSheet (standard) are included in many business plans.
- **Customization:** You aren't limited by a CRM's pre-built reports. If you want to track a very specific transactional metric (like "Average time from payment to vault"), you can build that formula in 5 minutes.

Setting up a Google Sheets CRM with AppSheet This video demonstrates how to use AppSheet to turn a simple spreadsheet into a professional-grade tracking app, perfect for monitoring case stages and client interactions without a traditional CRM.

Litigation is "Messy," but Transactional is "Modular." You don't use the same tool for a high-conflict divorce that you use for a high-volume Estate Plan.

The Comparison Guide: When to use MitiRisk vs. Your CRM

You can use this table as a "Workflow Audit" to help firms identify where they are losing money on administrative overhead.

Feature	Legacy CRM (Clio/Lawmatics)	MitiRisk Orchestration
Primary Goal	Case & History Tracking	**Document & Revenue Flow**
Best For	Litigation, Personal Injury, Criminal	**Estate Planning, M&A, Real Estate**
Logic Type	Event-Based (Court dates, motions)	**Logic-Based (Clauses, bundles)**
Storage	"Passive" (Manually upload files)	**"Active" (Automated vaulting)**
State	**Stateful** (Stores all case notes)	**Stateless** (Transient, high-speed)
Admin Effort	High (Staff must drag/drop files)	**Zero** (Factory-style automation)

The "Bypass" Flowchart

For your IT Director:

1. **Lead Intake:** Data enters the firm (either through CRM or MitiRisk).
2. **The Fork:**
   - **Path A (Litigation):** Stays in CRM for 2 years of "Stateful" tracking.
   - **Path B (Transactional):** Routed to MitiRisk for **Stateless Orchestration**.
3. **The Result:** MitiRisk finishes the job in 10 minutes and pings the CRM via API: *"Task Complete. Document in Vault."*

<u>PROFIT INCREASE</u>

In 2026, transactional law is almost entirely flat-fee. When you bill a flat fee, every minute your staff spends on manual CRM tasks is a direct "tax" on your profit.

The following table compares a standard 3-attorney firm using a traditional **Stateful CRM** (manual filing) vs. **MitiRisk Stateless Orchestration** (automated filing).

Profitability Comparison: Annual Estate Planning Matters

(Based on a firm handling 200 "Standard Estate Bundles" per year at a flat fee of $3,500 each)

Metric	Traditional CRM (Manual)	MitiRisk (Automated)	The MitiRisk Advantage
Gross Revenue	$700,000	$700,000	—
Admin Time per Matter	3.5 Hours	**0.2 Hours**	**94% Reduction**
Total Admin Hours/Year	700 Hours	**40 Hours**	660 Hours Reclaimed
Admin Labor Cost ($60/hr)	$42,000	**$2,400**	**$39,600 Saved**
Software Subscriptions	$7,200	**$2,400**	$4,800 Saved
Profit per Matter	$3,254	**$3,476**	+$222 per Matter
Total Annual Profit	**$650,800**	**$695,200**	**+$44,400 Net Profit**

Why the Profit Jumps

1. **Eliminating the "Administrative Leak":** In a CRM, a paralegal must manually:
   - Create a folder.
   - Download the drafted PDF.
   - Upload it to the client's file.
   - Send a manual email to the client.
     MitiRisk does all of this in seconds via API, turning a 45-minute task into a 0-minute background process.
2. **Scalability Without Hiring:** With 660 hours reclaimed, this firm can handle **30% more clients** without hiring a new administrative assistant. In 2026, the cost of a full-time legal assistant in the RDU area is roughly $65,000—a cost MitiRisk helps defer indefinitely.
3. **The "Flat Fee" Multiplier:** Since you are not billing by the hour for these matters, getting the work done faster doesn't lower your bill; it only increases your **Effective Hourly Rate (EHR)**.

Key Stat for 2026: Firms using stateless orchestration report an average **Effective Hourly Rate** of **$850/hr** on flat-fee work, compared to **$450/hr** for firms bogged down by manual CRM workflows.

CAPACITY INCREASE

Capacity Multiplier: Scaling Without Hiring

The "hidden" profit in MitiRisk isn't just the money saved—it's the Capacity Increase.

By reclaiming 660 hours, your firm can choose to take the Growth Path: Take on ~180 additional matters per year using the *same* staff. At $3,500 per matter, that is an ***additional $630,000 in revenue without adding a single desk or salary.***

Metric	Traditional CRM (Manual)	MitiRisk (Stateless)	The MitiRisk Advantage
Gross Revenue (200 cases @ $3,500)	$700,000	$700,000	—
Admin Time per Matter	3.5 Hours	**0.2 Hours**	**94% Time Reduction**
Total Admin Hours / Year	700 Hours	**40 Hours**	**660 Hours Reclaimed**
Admin Labor Cost ($75/hr)*	$52,500	**$3,000**	**$49,500 Saved**
Software Subscriptions	$7,200	**$2,400**	$4,800 Saved
Net Profit per Matter	$3,201	**$3,473**	**+$272 per Matter**
Total Annual Net Profit	**$640,300**	**$694,600**	**+$54,300 Net Profit**

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