

Rosen Law Condenses eSignature Process with OnTask

CASE STUDY

Overview

Charles MacCall, Chief Operating Officer of Rosen Law, is no stranger to organizing and keeping track of a plethora of paperwork. The law firm uses eSignature software to send, receive, and keep track of legal documents for their clients. This helps to expedite their processes, and better manage each individual case within their firm. Before getting started with OnTask, Rosen Law was using DocuSign, but MacCall was keeping an eye out for something new. He wanted an eSignature software that was more cost-efficient, compatible with other systems, and did not require multiple third-party companies to get a variety of tasks done.

Challenges

Although Rosen Law was getting by using DocuSign, they needed a less costly alternative that was versatile and included more features. “As a package, OnTask provides all these different tools under one company, as opposed to us having to go to multiple third-party companies,” MacCall said.

MacCall said that their current document automation solution was not being updated as regularly as their law firm needed. Because of this challenge, Rosen Law was looking for software that both supported additional document processing and allowed for easy integration with the other systems and platforms they used.



Rosen Law, a divorce law firm located in the Raleigh area of North Carolina, was created to provide a smooth and lower-cost experience for those seeking legal resources and assistance. They wanted to demystify the divorce process and create full transparency in an industry that traditional lawyers usually keep hidden. The firm helps clients with the daunting aspects of the divorce process, like finance distribution, child custody, child support, and more.



I really like the OnTask team. I love how quick you are to communicate. I love your personalities. I find that working with a lot of different companies, especially in the tech sector, that people are very cold and robotic; they want to go through a script when talking to you. With OnTask, this is knowledge your team has in their heads, and you're having a genuine conversation. I appreciate your support 100%.



— Charles MacCall, Chief Operating Officer

Challenges (Continued)

Rosen Law also needed to see a breakdown of their contract workflows to monitor how they were progressing. Since their previous eSignature software did not include flowcharts or API integrations, they struggled to maintain visibility into their processes.

Rosen Law first discovered OnTask through a Legal Week showcase that demonstrated the benefits of using the intuitive platform to create legally binding signatures for documents. MacCall met with the team there and became intrigued by the visibility OnTask provided compared to DocuSign. MacCall was interested in the added benefits OnTask provided like document automation and the ability to automate the signing process from start to finish in a simple, transparent way.

Results

When beginning their journey with OnTask, Rosen Law used the free trial to test out all the different features before fully integrating it into their firm. This provided them with a risk-free introduction to OnTask. The trial gave them the opportunity to experience how it worked and allowed them to decide if it was a good fit without committing to making the switch immediately.

Rosen Law received personalized assistance from the OnTask support team to create a seamless transition. "I find that working with a lot of different companies, especially in the tech sector, that people are very cold and robotic," MacCall said. With OnTask, Rosen Law received quick, helpful, and genuine communication when they had questions or needed guidance. Thanks to this outstanding support, OnTask is positioned to remain a reliable and consistent tool for their firm in the future.

After transitioning fully to OnTask, Rosen Law has integrated the eSignature feature with Salesforce to streamline their document processes and help clients expedite their paperwork. Legal forms that are used for divorce, child custody, property division, and more can be sent electronically, providing an easy way for copies of those signatures to be securely organized.

Results (Continued)

In addition to the eSignature feature, MacCall can now gain insight into how each workflow is functioning: “I like to get under the wire of things. With OnTask I can look at a flow chart and how specific processes are going. I can even work with APIs to make sure that things are working. You can’t really look under the hood with DocuSign, so that was an advantage of using OnTask.”

About Rosen Law Firm

With offices in Raleigh, Cary, and Chapel Hill/Durham, Rosen Law Firm is the largest divorce firm in North Carolina. Founded in 1990, the firm is dedicated to providing individual growth and support to couples seeking divorce by helping them move forward with their lives. Rosen Law’s staff of attorneys, accountants, and specially trained transition coaches expertly address the complex issues of ending a marriage. Their innovative approach acknowledges that divorce is so much more than just a legal matter. Specialties include child custody, alimony, property distribution, separation agreements, and domestic violence relief. To learn more visit <https://www.rosen.com>

About OnTask

OnTask by Accusoft is a web-based, no-code workflow automation platform that allows organizations to replace their tedious, error-prone manual processes with digital forms and documents. Originally created to help streamline Accusoft’s internal sales process, OnTask has evolved into a feature-rich platform that creates smooth digital experiences. Choose from a library of pre-built templates or build a customized workflow to gather information from digital forms, create documents, route data to the appropriate destination, and verify with eSignature all within one automated, easy-to-use platform. Developers can also integrate workflow functionality into their applications with the OnTask API. For more information, visit ontask.io.