imagility

Automating
your Practice

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Overview

The US immigration process comprises complex steps that includes beneficiary details, voluminous forms, employment details (depending on visa type), supporting documents, cover letters and other components. Attorney and immigration teams spend a considerable amount of time answering client enquiries, case status calls or scheduling appointments with clients. If all these repetitive tasks could be taken care of or integrated in the immigration workflow itself, it would help attorneys and immigration teams save an enormous amount of time on non-billable work.

This playbook will cover various areas that law firms can automate to streamline internal processes to improve output. This will increase efficiency and speed up critical, billable work in law firms. To learn how Imagility can help you automate your practice, contact **sales@imagility.co** or **call 617-865-8444.**

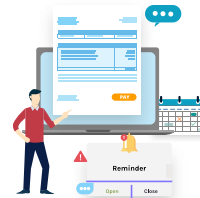# Automating your Practice

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Make the **right choice**

Automating the Client Intake Process

- **Manual intake process is time consuming and non-billable**
- Automating intake forms that can be filled remotely with e-signatures
- Filled data can directly get auto populated into the petition

The Client intake process is the most important step towards starting a cordial working relationship with clients. But this is also the most time consuming and exhaustive. Automating the intake process has many advantages:

- It allows clients to build their own profiles, thus keeping them engaged in the intake process.
- Directly onboarding clients to immigration software application or platform using valid

credentials, to login and enter education, immigration, employment, and family details, would start the immigration workflow smoothly.

- Profile data can be re-used multiple times for as many immigration events as possible, along with the flexibility of updating it at any time.
- This one-time activity could foster a long-term relationship with the client,
- No more time is lost in data entry. Once client information and case details are entered, they are securely stored in one central location, that can be easily accessed by staff who have relevant permissions, from anywhere.
   Time is freed up for other billable tasks.
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Automating the Visa Process

- **Visa petition building can be repetitive and error prone**
- Guided petition building through petition timelines
- Automated petition analysis with recommendations to cover all gaps and improve success rates

Petition building is the core purpose of any immigration software or platform. Once the client's requirements are captured, the relevant visa process gets triggered. What to look for in the visa process:.

- An active dashboard that shows tasks' status at a glance.
- Each task for any visa divided into steps, with each step leading to a set of actions on a self-explanatory timeline. This would simplify visa processes to a great extent.
- At the end of the task the software should pull together all the data entered by various stakeholders and a well-structured petition all set to be submitted to the USCIS is ready! This would be true workflow automation.
- **An intelligent virtual adjudicator** that can highlight missing details from a petition, and suggest recommendations to building effective petitions, minimizing RFEs and denials would save hours and hours of time spent manually by Attorneys.

Automating Notifications, Alerts, and Calendar Events

- **Complexity of immigration events makes it difficult to track journeys**
- Only automated alerts, notifications and calendar events can track all immigration events
- Leaves no room for memory lapses

All communication challenges between attorneys/immigration teams and clients could be resolved by immigration software/ platform, with the ability to send automatic notifications and alerts for important immigration events, reminders for court dates, meetings etc.

- This would be a big value-add that could cut down email, telephonic and in-person meetings by half.

- Automating appointment scheduling will get rid of any manual scheduling and memory lapses.
- Clients will receive an automated appointment reminder, and so will you, ensuring that everyone stays on track and no room for errors or memory lapses.

Automating the Green Card Process

◆ **Convoluted and long Green Card Process**
◆ The process to get a Green Card is extremely strict and highly regulated
◆ Need expertise to handle the long, complicated process smoothly, no room for error

The Green Card process is not straight forward. Most often, an experienced immigration attorney keeps track of continuously changing immigration law, is aware of common errors made by clients, and is always up to date on any news relevant to the field. Automating the GC process would help both attorneys and clients navigate the path smoothly.

- ◆ Intelligent automation can provide comprehensive visa and green card automation. Key elements of the petition can be built meticulously through a guided approach to building robust petitions.
- ◆ Guided PERM steps with recommendations
- ◆ I-140 steps in elaborated color-coded timelines for beneficiary and petitioner
- ◆ I-130 and I-485 in elaborated steps for family based Green Card

Automating Invoicing and Collections

- **Billing clients & chasing payments is time-consuming and repetitive**
- Templatized invoicing
- Clients get automated alerts and notifications on payment due dates.
- Invoice efficiently & collect payments quickly

Consolidating bills and expenses for clients can take long. This delays the entire invoicing process and dispatching it to the client. Automating billing and invoicing can remove a big bottleneck in the entire process

- Templatized invoices can standardize the process.
- A transparent and accessible billing and expense process can save time
- Connecting billing and invoicing systems in a smooth workflow
- Alerts and notifications to clients regarding payment due dates reduces follow up calls and emails.

Reporting and Analytics

- **Business strategy and goals based on assumptions**
- Reports help make business strategies more targeted
- Forecasting, tracking, and managing immigration with standard & custom reports

Companies that invest on global talent need data to budget appropriately. Reporting and forecasting features are much needed to make informed business decisions and create relevant strategies to scale and grow businesses.

Managing multiple visa applications simultaneously can be challenging for both petitioners and attorneys. Basic and advanced reporting and analytics can be helpful.

- Reports that you can use to understand the status of petitions and beneficiaries.
- Create customized reports as per your/your firm's requirements and can be scheduled for a group of recipients as well.
- You can also create custom report templates and simply drag the data to be added there.
- Standard and custom reports to help track, manage, and control the immigration process.

Make the Right Choice

Imagility makes immigration simple and easy by breaking down convoluted immigration processes into smooth workflows that are intuitive to the user. It enables you and your clients to easily and securely share or exchange important files, with automated, transparent workflows, guided petition building and analysis, along with automatic notifications and alerts, cutting down drastically on emails and phone calls, saving precious time and money. Our smooth data migration process and post deployment support will also help you every step of the way.

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