UBTI's Automated Setup Helps a Law Firm Stay Court-Ready Across Every Probate Matter

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WHO WE ARE

" UB Technology Innovations is a Microsoft Power Platform delivery partner offering no/lowcode solutions, virtual bots, RPA, and data insights. We help clients on their digitalization journey by automating tasks, optimizing workflows, and providing a competitive edge through quick app deployment "

WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience

THE CLIENT

The client is an experienced probate and estate planning law firm supporting clients with wills, trusts, and court-supervised estate matters. Their attorneys practice closely with families, executors, and beneficiaries to handle asset distribution, court filings, and estate settlement matters with care and legal accuracy. The firm is known for clear legal guidance and steady support during emotionally and financially sensitive situations.

CHALLENGES

Our client handles 10+ new probate and estate cases every month, in addition to ongoing matters. When a person passes away, their assets, debts, and legal rights must be reviewed and transferred properly. This process, called 'probate', involves court approvals, legal notices, document filings, and coordination with multiple parties. It's a legally sensitive process that must follow strict timelines.

A single probate case can take 8-12 months with several mandated legal steps before assets can be distributed to beneficiaries. Our client teams manage multiple cases simultaneously, and each case generates substantial paperwork with pre-set deadlines and follow-ups. While the legal expertise was strong, the day-to-day handling of these steps relied heavily on manual work, leading to:

- Heavy paperwork across every case: Each probate matter required preparing several court forms, notices, and client declarations. Staff had to repeatedly fill out, review, and organize documents, taking time away from other legal work.
- Constant tracking across emails, files, and portals: Case updates were spread across inboxes, folders, and third-party legal websites. Attorneys had to open multiple systems just to confirm the latest case status.

- Risk of missing deadlines and court dates: Every probate process has a strict deadline. When tracking is manual, there's a risk of overlooking the date, which can delay the case.
- Repetitive data entry into different systems: The same client and case details were entered repeatedly across forms and portals, increasing both effort and chance of typing errors.
- Delays caused by incomplete information: If client details were missing, work stopped until someone followed up. This created back-and-forth communication and slowed progress.
- Limited visibility into case progress: There was no simple way to see which stage each case was in. Senior attorneys often had to ask staff for updates rather than see a clear status.

SOLUTION

UBTI worked closely with the client and observed how the attorneys handled probate cases from start to finish. We understood that much of the workload came from preparing legal documents, checking portals, and tracking case progress. So, our team designed an Intelligent Automation solution with approx. 50 interconnected workflows, supporting the complete probate lifecycle in:

- Case intake: The first step in probate is the staff collecting details about the deceased, family members, and known assets. Instead of writing notes and later retyping them, staff enter these details into a secure internal Microsoft Form while speaking with the client. Required fields ensure critical details are not skipped. Once submitted, automation immediately:
1. Stores the data in SharePoint;
2. Creates a digital case record;
3. Generates a dedicated folder for that case.

This means the case starts with organized, usable data rather than scattered notes.

- Case setup and initial documentation: After intake, probate requires multiple legal documents to be prepared using the client's details. Here, automation pulls the stored information and fills approved document templates with names, dates, and estate details. Attorneys only review and confirm accuracy instead of drafting from scratch. The system sends documents for e-signature after staff review, and the signed copies automatically return to the case folder.
- Court and portal submissions: Probate cases require formal submissions to courts or third-party legal websites. At this stage, staff remain responsible for legal review and decision-making. However, automation supports the submission work by:
1. Logging into court portals securely;
2. Entering case information;
3. Uploading prepared documents;
4. Pre-filling court-specific fields for final submission.

This removes repetitive portal data entry and reduces typing errors. Upon submission, filing confirmations and reference details are stored back in the case record. So, every filing has a clear digital trail.

- Hearing and deadline tracking: Once hearing or deadline dates appear on court portals, the automation:
1. Monitors these updates;
2. Triggers Outlook calendar entries;
3. Sends reminders for the legal team.

This ensures the team acts promptly without maintaining separate trackers.

- Stakeholder notifications: As the case moves forward, automation sends updates at key stages to beneficiaries, attorneys, and stakeholders. Staff no longer need to remember who to notify and when.
- Court clarifications: Responding to court queries and clarifications remains a legal task handled by attorneys. Automation supports this stage by keeping all related documents and updates organized in a single SharePoint case record, so staff can find everything in one place instead of searching through emails or paper files.
- Petition drafting: Near the end of probate, final petitions and distribution documents must be prepared for court approval. At this stage, our team introduced an AI that:
1. Reviews the full case record stored in SharePoint;
2. Generates a draft summary for the final petition using the existing case data.

So, instead of assembling details manually, staff receive a ready draft that reflects the case history, assets, and steps taken using the factual case data already captured. Attorneys only remain responsible for legal accuracy and final approval.

- Closure and record archiving: When a probate matter concludes, the system compiles final documents, marks the case as closed, and moves records into an archive. Closed cases stay searchable but do not mix with active ones, creating a complete digital trail for audits or future reference.

OUTCOME

With UBTI working alongside the legal teams, our client's probate operations transitioned from a labor-intensive process to a well-structured workflow with:

- Reduced filing errors and rework: Built-in validations, standard templates, and automated detail verification lower rejection rates and avoid last-minute corrections with the court.
- Capacity to handle more cases without adding staff: With data capture, document creation, and portal entries supported by automation, the attorneys can manage a larger monthly caseload without increasing headcount.
- Better client experience during a sensitive time: Families receive timely updates and face fewer delays, which makes the probate journey clearer and less stressful.
- Stronger firm reputation: When cases move on schedule and communication stays organized, clients and referral partners see the firm as reliable and well-run.

Conclusion:

Before this project, our client firm's lawyers were handling probate matters through extensive documentation and constant follow-ups. A vast majority of their time was spent on clerical work rather than legal judgment. UBTI helped put an automated structure in place so the firm can meet court expectations more reliably. Case details are captured in a usable format from day one, documents are prepared from approved templates, submissions are supported by automation, deadlines are pulled from actual court updates, and final petitions are drafted from real case records by an AI. With solutions from UB Technology Innovations, Inc., lawyers can spend their time on client counsel, while our system handles the rest of the administrative steps, from start to closure.

ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions Partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.

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Microsoft CERTIFIED — POWER PLATFORM FUNCTIONAL CONSULTANT — ASSOCIATE

ISO 9001:2015

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Microsoft CERTIFIED — POWER PLATFORM DEVELOPER — ASSOCIATE

Microsoft CERTIFIED — POWER BI DATA ANALYST — ASSOCIATE

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