



Partner Success Story

Rapid Application Development

ATTORNEYS TRUST ALPHA FIVE

Attorneys Trust Document Service

“We didn’t have to sacrifice power and flexibility for ease of use. Alpha made it possible for us to build a professional document generation application that’s easy for ATS clients to use, and easy for ATS executives to manage.”

 Steve Wood, President, AlphaToGo

Customer Situation

Attorneys Trust Document Service prepares complex estate planning documents for attorneys and financial professionals, who provide them to clients. But the fast-growing company was facing time and productivity challenges. ATS received too many telephone calls where clients asked the same questions again and again. Company management decided they needed a convenient, self-service Web site that provided stock answers to standard questions, and also offered some valuable services. They also wanted to appeal to younger, Web-savvy professionals. Unfortunately, they quickly found it impossible to build a data-driven Web site using popular applications, such as Dreamweaver and Front Page.

Partner Solution

Attorneys Trust Service turned to an Alpha Software partner, AlphaToGo, in San Ramon, Calif. They asked AlphaToGo to create a Web site that provided a secure, interactive online document request form, as well as an extensive knowledge base to search and find answers to common questions. Using Alpha Five, AlphaToGo designed, developed, debugged, and deployed a state-of-the-art, secure Web site with database-driven support and document services. AlphaToGo also developed a work-in-progress tracking system that allows ATS’ clients to access pending work; find client contact information, get maps and directions, automate progress tracking, and distribute status e-mails to authorized parties.

Solution Overview

Customer Name: Attorneys Trust Document Service Inc.

Customer Profile: Attorneys Trust Document Service (ATS) was founded in 1991. The company goal was to create and deliver the most highly-customized estate planning documents available for clients of California attorneys and financial advisors. Having succeeded in California, ATS is now expanding nationwide.

Location: San Ramon, Calif.

Industries: Law, Trusts & Estates, Estate Planning

Business Situation:

Attorneys Trust Document Service was dealing with a high number of telephone calls to answer basic questions about their service. The company wanted a Web site that would answer questions automatically to improve customer service, and reduce unnecessary phone calls. ATS was also looking to appeal to younger, Web-savvy clients. They wanted to let attorneys and financial professionals easily gather necessary information so they could concentrate on building their practices.

Benefits:

The application built in Alpha Five provides an online experience that's easy for ATS clients to use, and easy for ATS executives to manage. Unlike other platforms that address narrow aspects of Web development—such as page design, database, or scripting—Alpha's complete integration between Web design, desktop application, and Web database server allow in-house workers to have a rich desktop application, with all the features Windows programs provide, while clients can tap the database via any Web browser. The resulting database-driven application is secure, meets all of ATS' initial requirements, and then some. The new Web site immediately reduced the number of inbound phone calls, while attracting exponentially more clients—including a younger demographic who prefer Web-based applications. Lastly, ATS' site can be customized by anyone, without requiring programming skills. This empowers ATS to provide Web services to third-party organizations that want to use it for their own clientèle.

For More Information:

Alpha Software

781-229-4500

AlphaSoftware.com

Attorneys Trust Document Service

800-341-4449

AttorneysTrust.com

AlphaToGo

650-759-4700

AlphaToGo.com

Solution:

Attorneys Trust Document Service turned to an Alpha Software partner, AlphaToGo, in San Ramon, Calif. Using Alpha Five, AlphaToGo was able to design, develop, debug, and deploy a state-of-the-art, secure Web site with database-driven support and document services.

Products:

- Alpha Five

Benefits:

- Easy-to-understand self-service interface for clients.
- Easy to deploy and manage Web database server.
- Speedy access to advanced features and services for clients.
- Total integration between desktop, Web site, and hosted database.
- Number of inbound phone calls dramatically decreased.
- Self-service model attracting new clients.
- Site and services are easy to customize.