

**Southport Technology Group**

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# Sanford Law Firm

Court Document Manager



# From Manual To Automated Document Processing

**01. Employment Law**

**02. PACER**

**03. Processing Manual Inbound**

**04. Where the Paper Trail Leads**

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# 01. Employment Law

Mistreated workers often feel there are few options for remediation

For workers that have been mistreated, it often feels as if there are few options for remediation. Businesses tend to have the upper hand in matters of legal sophistication. It's unlikely that your average worker has ever dealt with a lawyer in any context, other than purchasing a home. Many would-be legal disputes will go to rest in the mind of a potential plaintiff, due to the complexity of navigating the legal system.

Lawyers representing these employees need to have many years of experience. In the law, this means many times in court, win or lose, and a proven method to deal with the extremely competent defense attorneys representing major corporations. Sanford Law Firm is the largest experienced employment law firm in the United States. Their track record includes cases against 1,300 companies. Over and over again, they use a trusted playbook to represent individual workers on contingency. Over and over again, they win on behalf of their clients.

## 02. PACER

PACER is a giant database of PDF documents from federal trials

The US Federal Court system is complex. About 1,700 federal judges see 400,000 cases per year. One thing the legal system is definitely specialized in: generating paper trails. Anyone involved in a dispute has signed and managed their share of documentation.

PACER (Public Access to Court Electronic Records) can be accessed by any individual via [pacer.uscourts.gov](https://pacer.uscourts.gov). As authorized by congress, there is a public interest and public right to documentation from federal trials. PACER is essentially a giant database of PDFs, each numbered and stored relative to the docket number for the case.

In an ideal world, PACER would neatly categorize and archive all the documents relevant to a specific attorney or law firm. You could imagine logging into your “PACER Dashboard” as a practitioner and accessing all the past and present documents relevant to your work. Unfortunately, PACER is more of a library of information with no curation for the parties that spend a lot of time using it. The best option for an attorney: sign up to receive notifications for trials. From those notifications, it is the responsibility of their team to catch the inbound documents, process, and manage.

## 03. Processing Manual Inbound

The goal: making a nearly full-time job of document management a background task

Gabriel Stiritz joined Sanford Law Firm as CFO in 2019. Gabriel brought the perfect operational match for the focused legal brand of Sanford Law Firm. His mandate was and still is transformation of the back-office to be as powerful and effective as the legal practice. Like the famed Toyota creed of continuous improvement, each item is evaluated on its own and the best systems are put into place, every day.

Gabriel was instrumental in the firm's move to Salesforce for case management. Cases, categorized by docket numbers, name, and venue are kept up to date in Salesforce. Documents, matching an equivalent standardized name scheme, are stored in Dropbox. Sanford Law Firm takes a large number of cases, and they are growing. This is in no small part related to the operational improvements that allow the team to focus on the law, not on managing manual workflows.

## 03. Processing Manual Inbound

A manual workflow that had stuck around, was the delivery of documents emailed from PACER, regarding the active cases the firm was litigating. Another wrinkle was the “free look” policy in PACER notification emails. PACER charges money for document downloads. The sum can be as low as \$0.10 or as high as \$500.00. Strangely enough, the first party to click a document link automatically gets the document for free. This means there is an ongoing administrative incentive to be the first party to click the link, download, and backup. Pouncing on inbound emails is practically a full-time job. Backing up documents with specific conventions is formulaic, but to do it manually is error-prone and tedious.

Although we had no prior experience with the Federal Court system, multi-system coordination between PACER, Salesforce, and Dropbox is a problem tailor-made for Southport Technology Group. In early 2021, we worked with Gabriel Stiritz and his operational team to develop court document delivery from email, free download, Salesforce, and finally to Dropbox. The plan was to make the nearly full-time job of document management a background task. This came with the built-in advantage of savings due to the system’s near-instant downloads.

## 04. Where the Paper Trail Leads

Southport Technology Group built automations that save money and time, allowing the team to focus more on case work and less on document processing

While both Salesforce and Dropbox have sophisticated APIs, government systems tend to be more old fashioned. The trickiest part of the process was the PACER document retrieval, which was entirely reliant on email. We implemented a universal inbound processing function utilizing serverless AWS Lambda functions. Emails come directly from PACER or are forwarded from members of the firm. The minute an email is intercepted, the relevant case data is parsed. The document link is collected, and the document itself is immediately downloaded utilizing the “free look” link.

Downloaded documents use their embedded case data to match with open cases in Salesforce. If no open case is found, the team is notified, at which point they can either disregard the document or update the case data in Salesforce.

Matched documents are delivered, finally, to Dropbox. The identifier of the case-specific Dropbox folder is written back to Salesforce so that the team can ensure all documents related to a specific case end up in the same folder, regardless of whether or not the folder has changed name or location.

## 05. Continuing Improvement

The new systems  
open up opportunities  
to create even more  
process efficiencies

Managing court document delivery opens up a number of new operational avenues for Sanford Law Firm. A high-performance, growing firm like Sanford is managing a greater information footprint than ever before. With the existing connections to Salesforce, Dropbox, PACER, and the email system, we can build more tools and retire more manual workflows at a fraction of the initial cost.

On the heels of this work, we've greenlit another companion project in Salesforce. Through our relationship with Sanford Law Firm and our new knowledge of PACER, we began working with The Free Law Project. This has enabled many more interested parties to take advantage of PACER document delivery via an open source webhook.

Sanford Law Firm already boasts the title of "Number One Employment Law Firm in the United States.\*" Through the wisdom and ingenuity of their team, we believe they're one of the leanest, most resilient operators in the legal profession. We've been proud to help them automate the boring stuff so they can get back to winning on behalf of their hard-working plaintiffs.

\*<https://unicourt.com/blog/us-district-courts-labor-litigation-2020>

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