



Standardizing Legal Work Across 10 Practice Areas
with Mitrates Case Management

**How a multi-practice law firm built its operation
on Mitrates CaseCloud™ and turned that
decision into a competitive advantage.**

3+

Platforms replaced

10

Practice areas supported
on the new platform

7+

Years with
Mitrates CaseCloud™

Firm Overview

Estrella LLC is a full-service law firm based in San Juan, Puerto Rico, with more than 50 years of continuous operation. Serving corporate clients and individuals alike across ten practice areas — including litigation, corporate and commercial work, labor and employment, bankruptcy, real estate, intellectual property, tax, general counsel outsourcing, and more — the firm has garnered a reputation for responsiveness and transparency.

For years, this complex, multi-practice operation ran on a collection of disconnected desktop systems: a case management application, a separate billing system, an accounting platform that didn't talk to either. Every matter touched multiple systems, which meant every matter created multiple opportunities for things to fall through the cracks.

Alberto Estrella, managing partner, knew the infrastructure wasn't keeping pace with where the firm wanted to go. What he was looking for wasn't a software upgrade.

It was a foundation: **one platform that could handle the full lifecycle of every matter, across every practice area, and still adapt as the firm's needs changed.**

Alberto Estrella
Managing Partner
Estrella LLC





In September 2017, Hurricane Maria arrived and made the stakes concrete:



I remember colleagues who still had servers in their law firms. People had to physically carry them down 20 flights of stairs to take them home.

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC

Estrella had already begun moving toward cloud infrastructure before the storm. Attorneys had virtual desktops. But the applications running on those desktops were still legacy software: local, siloed, and dependent on physical hardware. Hurricane Maria showed exactly what that exposure looked like in practice. Prosecutors at the Puerto Rico Department of Justice had to visit their offices in person to download files onto a thumb drive. Colleagues were ferrying servers down stairwells to connect them to home internet connections just to read email.

For Alberto, it was confirmation, not a wake-up call. The firm was already moving in the right direction. The Disaster made it clear the next step couldn't wait.



Selecting the Right Foundation

In 2018, Estrella ran what Alberto describes as an exhaustive due diligence process: trial accounts, demo access, and hands-on testing across every cloud-based practice management platform available at the time. The evaluation centered on finding a foundational technology they could build on for years. Two requirements drove the decision above everything else:

The first was customizability. Estrella is a mature firm with established workflows across ten distinct practice areas. **Platforms they'd outgrown required the firm to adapt to the software. A new platform had to adapt to the way Estrella worked.**



We knew it was a robust platform. Tried and tested, user-friendly, secure, and integrated with thousands of other platforms. More importantly, it was customizable.”

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC

The second was the underlying infrastructure: enterprise-grade security, integrations, role-based access controls, and compliance certifications. And critically, an interface that was familiar to attorneys, and didn't require weeks of retraining.

This led them to Mitratch CaseCloud™, built on Salesforce.

From Pilot to Deployment: Implementing CaseCloud™ Firm-Wide

Estrella ran a targeted proof of concept, starting with the consumer affairs practice area and a single high-volume client who could provide informed feedback throughout the process.

The attorneys, paralegals, and assistants working those matters moved entirely to CaseCloud™. No hybrid approach. No keeping the old system available for that work. The POC was designed to produce real answers.

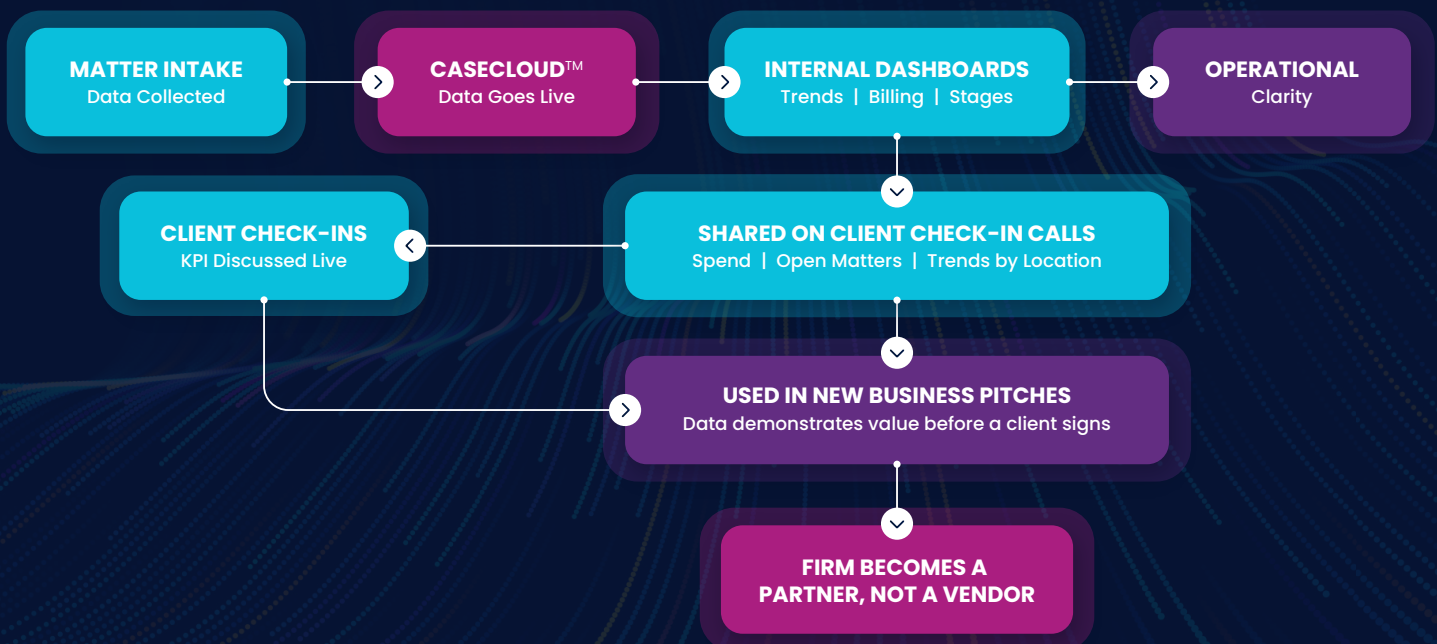
The firm validated the platform, built out custom workflows, and collected enough direct feedback to move forward with confidence.



If you let people continue using the same platform they had before and just add the new one, it's difficult to get them to actually use it – unless you require it."

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC

FROM MATTER DATA TO CLIENT PARTNERSHIP





Scaling Across All Practice Areas

Once the pressure-testing was completed, Estrella executed a firm-wide migration for every practice area. They moved simultaneously to CaseCloud™ for practice management and Box for cloud document storage, integrated directly within the platform.

The change management approach was direct: access to legacy systems was removed. Staff could still view historical data if they needed it, but they couldn't work in the old system.

It paid off. **Within a short period, the firm was operating entirely on CaseCloud™ across all ten practice areas, and hasn't looked back.**

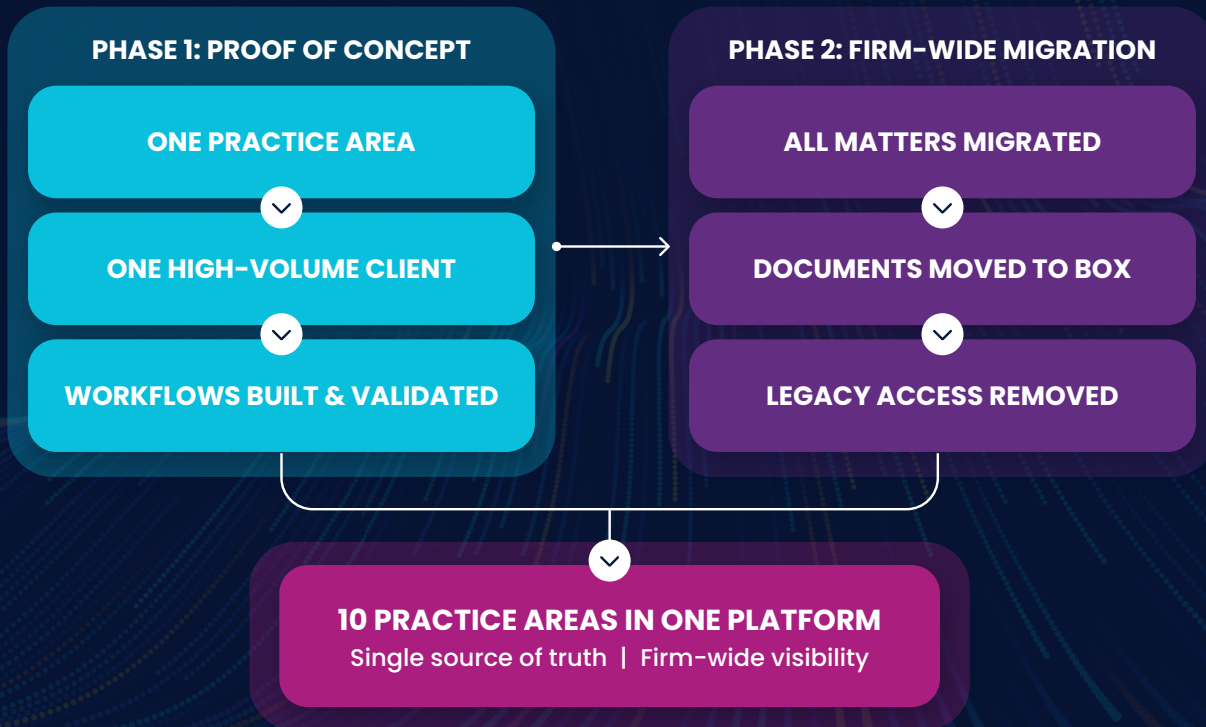
The Impact of a Unified Platform

1. One System of Record Across Every Practice Area

The most significant change at Estrella isn't any single feature. It's that every practice area runs on the same platform, uses the same workflows, and is visible in the same reports.

The practical difference: when someone opens a matter, the full life of the case and client is already there, activity history, emails, tasks, and events. Anyone can answer a client call without having to track someone down.

TWO-PHASE IMPLEMENTATION



2. Intake That Closes During the First Call

Matter intake at Estrella used to be a multi-day process: an initial conversation, a follow-up email, a conflict check run separately, an engagement letter sent by PDF, a fax or scanned signature returned, a deposit invoice, and then, eventually, a matter opened in the system.

Today, that entire sequence happens during the initial client call. Alberto collects or sends a link to collect contact information. A conflict check runs. An engagement proposal generates through a workflow and goes out via DocuSign. A trust request with a payment link follows automatically. Once the client signs and pays, the matter opens in CaseCloud™, the engagement letter saves to Box, and the team receives a task to begin work. By the time the call ends, the matter is live.

For a firm that has built its reputation on accessibility and responsiveness, **It turns a promise into something clients can actually see.**



We've been able to engage new clients simply because we could demonstrate the benefit of working with us, working with the system"

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC

3. Reporting That Wins New Business

Early in the CaseCloud™ implementation, Estrella's team realized something: the data they were collecting for their own operational visibility was also valuable to clients. Matter trends, legal spend by facility, case type breakdowns, open and closed matter counts, information that had previously lived in static fields in a legacy system was suddenly alive, relational, and easy to surface.

The firm began sharing dashboards with clients in regular check-in calls. The response was strong enough that Alberto started

bringing them into new business conversations. In one instance, Estrella was pitching an existing litigation client on their labor and employment work. Rather than a standard capabilities presentation, Alberto pulled up a dashboard showing that client's litigation matters broken out by facility — flagging which locations were generating disproportionate case volume. His pitch: give us more of your work, and the data gets more useful. More practice areas mean more cross-functional visibility, more trends you can act on, more insight into what's actually driving your legal exposure.

The firm has won new clients on the strength of this capability alone: being able to demonstrate, in a business development conversation, the depth of reporting and transparency they can provide. It answers the question corporate clients are increasingly asking of their outside counsel: how do I know what I'm getting for what I'm paying?

Alberto puts it plainly: **Estrella is no longer just a service provider to those clients. They're a business partner. The data makes the difference.**

4. Adoption That Sticks, Even for the Skeptics

Attorney adoption is where technology investments can stall. At Estrella, it held, even with people Alberto least expected.

One senior partner, a top performer at the firm, was openly opposed to time entry. He said he would rather be let go than be required to enter his own time. He had his assistant do it for him.

Sometime after the CaseCloud™ migration, Alberto walked past his office and found him at his computer, quietly entering time on his own.

CaseCloud™ won him over not with technical feature sets, but by being less friction than the workaround he'd spent years defending.



I asked him why he was doing it. He said: I find it so easy, it's actually easier for me to do it than to sit next to my assistant and dictate."

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC

5. Visibility That's Customized for Practice, and Consistent for Operations

Beyond reporting for clients, CaseCloud™ changed how Estrella's own team stays on top of matters day to day.

For practice teams, matter views are customized by practice area and record type. A labor and employment matter looks different from a licensing matter, which looks different from an IP matter, each surfacing the fields and workflow stages relevant to that type of work.

For leadership and cross-functional teams, standardized indicators across the platform, color-coded billing status, matter stage, and activity flags mean consistent visibility regardless of practice area. No one has to learn a different system to understand what's happening across the firm.

6. A More Resilient Operation

Estrella has now operated through two significant disruptions: Hurricane Maria and a global pandemic, without losing access to matters, documents, or client data. Peers who were still running on-premises infrastructure during the storm lost days or weeks of operational capacity. Estrella did not.

Business continuity isn't a feature firms talk about until they need it. Estrella needed it, and the infrastructure held.

What Comes Next for Estrella's Case Management

Seven years later, Estrella is still actively building on the platform. Alberto's team reviews workflows, fields, and forms every few months, as the platform and their work evolves. What started with intake has expanded to include repeatable workflows, activity plans, and deposition process workflows.

His advice for others in the evaluation process:

“

Select a platform that can be adjusted to you, even years after. Your practice will change. Your clients will change. The information you need will change. Make sure your platform can keep up.”

ALBERTO ESTRELLA,
MANAGING PARTNER
ESTRELLA LLC



A portrait of Alberto Estrella, a middle-aged man with short, wavy grey hair and glasses. He is wearing a dark blue suit jacket over a light blue patterned shirt and a dark red tie. He is smiling slightly and has his hands clasped in front of him. The background is dark and out of focus.

Alberto Estrella
Managing Partner
Estrella LLC

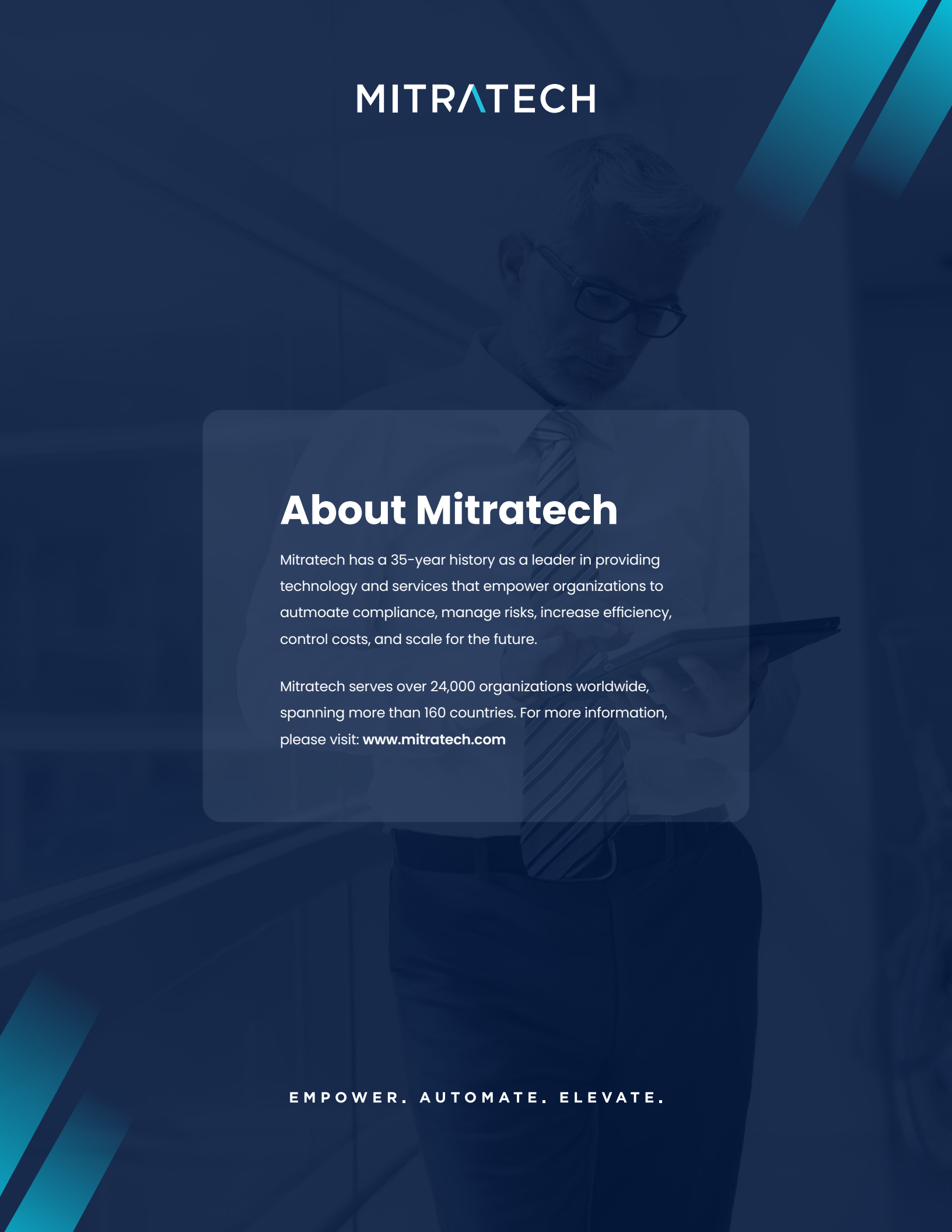
About Mitratesh CaseCloud™

CaseCloud™ is Mitratesh's cloud-native practice management platform for law firms, built on Salesforce. It supports the full matter lifecycle, across firms of any size and practice mix. CaseCloud™ is part of Mitratesh's comprehensive legal platform — including intake and workflow automation, document automation, matter management, and AI-powered capabilities — purpose-built for how legal teams work.

For over 30 years, Mitratesh has supported law firms and corporate legal departments worldwide.

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MITRATECH

About Mitratesch

Mitratesch has a 35-year history as a leader in providing technology and services that empower organizations to automate compliance, manage risks, increase efficiency, control costs, and scale for the future.

Mitratesch serves over 24,000 organizations worldwide, spanning more than 160 countries. For more information, please visit: www.mitratesch.com

EMPOWER. AUTOMATE. ELEVATE.