

Streamlining Investigations

A Case Study in Data Migration & Workflow Automation



The Challenge: Outdated Systems, Messy Data, and Workflow Bottlenecks

- A premier investigative services provider in Pittsburgh, PA was facing major operational roadblocks.
- Their **case management system was outdated**, their **2TB of investigative data** was a mess with inconsistent naming conventions, and their **integrations were breaking down**—slowing down workflows and making case tracking a nightmare.
- They needed a **seamless upgrade** without disrupting daily operations.



Faced with these challenges, our approach was simple: rebuild, streamline, and automate. Here's how we made it happen.

How We Transformed Their Data & Workflow Management

To bring their systems up to speed, we tackled four key areas:

- 1. Case Management System Overhaul** – Migrated them from Polonius to Clio for a smoother, more efficient workflow.
- 2. Large-Scale Data Migration** – Restructured and transferred **2TB of critical investigative data** to AWS S3, solving naming inconsistencies and API challenges along the way.
- 3. Integration Fixes & Upgrades** – Assessed and rebuilt **broken Salesforce integrations**, replacing outdated Zapier apps to restore full functionality.
- 4. Custom Automation** – Developed tailored apps and **optimized automation workflows**, ensuring the new system worked seamlessly without disrupting their operations.



**With these solutions in place, the transformation was immediate.
Here's what changed for them.**

The Transformation: From Chaos to a Fully Modernized System

After the transition, the firm experienced **smoother case management, reliable automation, and a fully modernized data system**—all without major downtime or disruption.

Before SST	After SST
Outdated case management system	Upgraded to Clio for better efficiency
2TB of messy, unstructured data	Fully organized & migrated to AWS S3
Broken Salesforce & Zapier integrations	Streamlined, reliable workflows
Manual, inefficient processes	Custom automation driving productivity

The Lasting Impact: A Smarter, More Efficient Operation

With a smarter, structured approach, this investigative firm **transformed its operations—modernizing workflows, organizing data, and making automation work for them, not against them.**



Now, imagine what this could do for your business. Let's make it happen—at no cost to you.

Turn Your Data Headaches into Seamless Workflows—at No Cost

- ✓ Struggling with outdated and messy data?
- ✓ Ready to automate tasks and streamline operations?

Let's map out the best way forward—at no cost to you.

Book Your Free Strategy Call Now
(724) 224-5380 | sales@smartsystemstechnology.com