



# how dealcloser reduced Performance Paralegal's office expenses by 33% in one year.

## background.

### *about Performance Paralegals.*

A unique firm located in Edmonton, Alberta, Canada, Performance Paralegals offers document preparation services to Alberta lawyers and accountants for corporate tax transactions. Performance Paralegals was founded in 2016 by Roberta Metivier and Douglas J. Forer—a paralegal and lawyer duo. Together, the team values technology, exploring innovative and progressive ways to bring value to their clients.

### *about Roberta.*

Roberta Metivier is a senior corporate and tax paralegal at Performance Paralegals Ltd. She has over 25 years of corporate and commercial legal experience with seven years specializing in corporate tax transactional work. Roberta is responsible for file and workflow management with supervisory, delegation and mentorship responsibilities.

## before dealcloser.

### *the problem.*

Before dealcloser, the number one inefficiency that Roberta faced was chasing signatures—which, as any paralegal already knows, is one of the most crucial yet tedious parts of managing corporate

and tax transactions. When signatures get delayed, it often slows down the whole deal, such as reporting, billing and, of course, completing the project. On average, it would take anywhere from 2–6 weeks for Roberta to obtain signatures. Then, when the signatures eventually came back, the next cumbersome step was to scan everything to create a closing book.

And the redundant tasks didn't stop there. Roberta often received frequent phone calls from clients asking the status of their deal, for their documents, or looking for an update. Though she understood that clients want to be aware of the process, Roberta knew that there had to be a way to automate these monotonous tasks.

### *finding dealcloser.*

Before Roberta even knew of dealcloser, she visited a legal technology conference in the hopes of finding a document & eSignature automation solution. After going from vendor to vendor, she wasn't able to find anything that could solve her problem. Coincidentally, when she sat down for lunch, a young lawyer sitting at her table said, "have you heard of dealcloser?" And the rest is history! The next day, Roberta gave dealcloser a Google search, booked a demo, and started a free trial.

## moving to dealcloser.

### *every day usage.*

It didn't take long for Roberta to get used to using dealcloser. In fact, the first transaction that Performance Paralegals did with dealcloser was over 500 documents! Before long, nearly every aspect of her workday was automated—and she's never looked back. Gone were the days of chasing signatures, photocopying hundreds of pages, and storing physical closing books.

“The service and the responsiveness has been there all the way through—dealcloser works so hard to resolve any issues as soon as they can and they've never left me hanging. I've never dealt with a software company that has that kind of responsiveness, ever. - Roberta Metivier”

Roberta reflected on how easy it was to adopt the platform, despite doing her job differently for nearly 20 years prior. dealcloser is active on her computer “all day, every day,” she says. And beyond that—Roberta spoke fondly of dealcloser's customer service, calling it second to none.

“I am so proud to put dealcloser in front of our clients. It truly represents the brand we want to convey. - Roberta Metivier”

## the results.

### *most valuable feature.*

Though Roberta is a dealcloser superuser and adores many aspects of the platform, her favorite feature is the instant closing book, because it replaces so much of what used to be very inefficient. Instead of preparing, scanning, printing, and organizing all documents, it's now instant—and she can swiftly move onto the next thing.

Beyond Roberta's personal experience using the platform, she also mentioned that using dealcloser has had a very positive impact on Performance Paralegals' brand, providing a professional image with their final product. And what's more—clients are often impressed with how quickly and easily their deals are completed.

### *cost savings.*

Roberta found it remarkable to see how quickly the cost of paper, toner and courier services went down after fully adopting dealcloser. In fact, between 2018 and 2019, Roberta and Doug saw a 33% reduction in office expenses. The firm now saves around \$3,500 per year in paper and ink toner alone. Factoring in the price of two annual dealcloser subscriptions, this is a cost savings of around \$2,000 a year for a two-person firm!

### *time savings.*

Though there's still the same amount of time in a day, it's now used in a more efficient and productive way. Overall, dealcloser allows Performance Paralegals to complete their transactions sooner—from beginning to end—allowing them to do more work in less time.

“This is the wave of the future. If you're not using a transaction management solution, you need to look into it. If you're doing it the old way, there's something not right. Make sure you don't get interrupted. Interrupt yourself. - Roberta Metivier”