



Success through Partnership

Transforming Legacy Probate Research with Modern Technology

CASE STUDY

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Executive Summary

A leading firm in probate research, faced the challenge of relying on an outdated, unsupported legacy application for managing family trees and genealogy information. SBL partnered with them to modernize their system, aiming not just to meet their current needs but to provide a platform for future growth, including AI-driven optimizations.



The Challenge

The customer was grappling with an outdated legacy application that hampered their efficiency and research capabilities. The system was unsupported, leading to:

- Security Risks
- Data Inconsistencies
- Limited Scalability
- Inability to Collaborate Effectively

The Solution

Requirements Gathering

An exhaustive set of requirements was developed, covering:

Security Measures

User Role Management

Data Representation

Data Representation

Import/Export Features

Reporting and Auditing

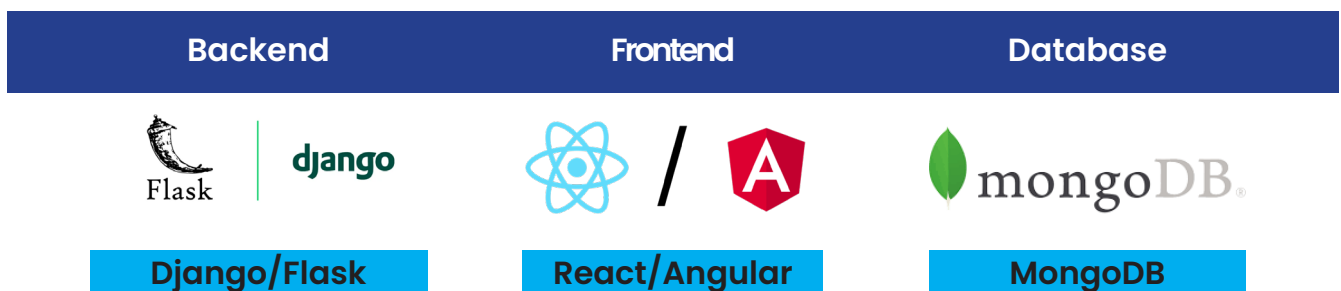
Constraints and Risks

The project faced inherent challenges:

- Open access to all user types could potentially introduce errors and reduce control.
- The absence of an assigning authority could lead to duplication of work.

Mitigation strategies, like the introduction of a lock feature and audit trails, were planned.

Technology Stack



Future-Ready

The platform was designed with the future in mind, allowing for the easy integration of AI-based optimizations to make probate research more efficient and accurate.

The Results

10x Benefit: The new application provided a tenfold increase in efficiency and data accuracy compared to the legacy system.

Collaborative Work: Real-time collaboration was enabled, allowing up to 25 researchers to work simultaneously on a family tree.

Data Integrity: Advanced validation methods and audit trails ensured data consistency and accountability.

AI-Ready: The application is designed to be future-ready, with the ability to integrate AI-driven features.

SBL's engagement with the customer stands as a testament to how modern technology can not only replace outdated systems but also add immense value to a business by being future-ready.



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