

## Case Study: BPM

### A Legal Plan Employees Actually Use



#### Challenge

Prior to Rocket Lawyer, BPM had an Employee Assistance Program (EAP) as part of their benefits package. However, nobody used it despite the company's efforts to promote it, such as sending reminder emails and inviting EAP representatives to speak to employees.

Lisa DeGisi, SPHR, BPM's Benefits and Wellness Manager shared: "It didn't work. Our EAP wasn't being used. So we thought EAP offerings such as counseling or legal help were simply not important to people."

#### Solution

DeGisi heard about Rocket Lawyer Legal Benefits shortly after trying to increase their EAP employee engagement. Rocket Lawyer offered a free trial and BPM decided to sign up. At first, DeGisi wasn't sure if BPM employees would use it, but everything changed a few months later. DeGisi shared

*"Six months after our trial started, Rocket Lawyer shared that 30% of our employees were using this benefit. That was a no-brainer for me."*

BPM

**BPM**

BPM employees  
**saved over \$60,000**  
on estate planning alone

Industry:  
Location:  
Customer since:  
Employees:  
Engagement rate:  
Legal cases:

**Accounting**  
**San Francisco**  
**2015**  
**1,000-3,000**  
**30%**  
**331**

Top legal topics:

**Estate planning**  
**Family & personal**  
**Real estate**

BPM is one of the largest public accounting and advisory firms in the United States. Based in San Francisco with offices around the world, BPM offers a thoughtful and comprehensive benefits package for their employees.

*“Every aspect of Rocket Lawyer was being used by our employees. It’s answering a need that our employees really had”*

### Legal made simple

BPM employees skew young and wanted to see a legal plan packaged in a way that is easy to digest. Employees liked that Rocket Lawyer is completely online and also has a handy mobile app. You can easily message a lawyer your legal questions within the app. DeGisi agrees:

*“Sometimes you don’t want to talk to an attorney on the phone. (With Rocket Lawyer), I can ask a question and get an answer quickly and just be done with it.”*

Employees also took advantage of Rocket Lawyer’s self-service document library, where they can customize legal documents on their own by answering a few questions. For example, many BPM employees and their dependents used Rocket Lawyer to create estate planning documents.

BPM employees fully leveraged their Rocket Lawyer Legal Benefits for a variety of needs. Some included resolving landlord/tenant issues, selling their property, and even researching divorce processes.

### A thoughtful benefits package

Instead of having an EAP with a large number of services, BPM now works with individual partners for specific services that meet its employees’ needs. For example, BPM partnered with Rocket Lawyer for the legal parts of financial wellness, another provider for therapy, and another company for physical wellness.

The strategy worked. Engagement increased for all of the benefits offered. DeGisi concluded:

*“The fact that we offered Rocket Lawyer shows to employees that we have a thoughtful benefits offering. It’s applicable for employees of any age and any stage of life. I cannot recommend it enough.”*

### Your employees get:



Access to more than 1,000 self-service legal documents



Unlimited Q&A and 30-min phone consultations with Rocket Lawyer On Call® attorneys



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