

STATEMENT OF *CAPABILITIES*



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OUR MISSION



We Build the Systems That Power Your Mission.

TechThinkTank helps organizations modernize their technology and operations so they can focus on people, not processes. We align IT strategy, financial systems, and software design with your goals, creating secure, efficient, and sustainable infrastructure that supports lasting impact.

WHY TECHTHINKTANK

Our team brings decades of executive-level experience across IT strategy, operations, and hands-on technical delivery. We work at the intersection of leadership and execution, helping organizations move from complexity to clarity.

We've built, modernized, and managed systems for organizations operating in high-trust environments. That experience shapes how we approach security, compliance, reliability, and long-term partnership.



Deep experience supporting complex, mission-critical organizations



End-to-end expertise across technology, operations, finance, and software



Proven ability to deliver and stabilize systems quickly



Transparent, partnership-driven approach focused on outcomes



Innovation-first mindset leveraging automation, AI, and analytics

CORE SERVICE AREAS



Software Development

We build custom software and integrations that make workflows, reporting, and collaboration easier. From AI-enabled document automation to role-specific dashboards and portals, our solutions improve accuracy, accessibility, and team-wide efficiency.



Technology Strategy Support & Consulting

We connect business goals to modern infrastructure. Our team delivers Managed IT services, CIO-level guidance, cybersecurity planning, and cloud solutions that keep your organization secure, compliant, and ready to scale.



Operations & Financial Systems Consulting

We simplify and strengthen the daily operations that keep your practice running. From matter intake to billing and reporting, we aid with recommending streamlined processes, reduce fiscal risk, and design systems that increase transparency and growth.

Your single partner across strategy, execution, and ongoing support.



TECHNOLOGY STRATEGY SUPPORT

Providing ongoing leadership and hands-on support to help organizations operate secure, stable, and well-governed technology environments.



Fractional CIO

Strategic, part-time technology leadership to guide decision-making, oversee initiatives, and support long-term planning without the cost of a full-time executive.



CIO as a Service

Dedicated technology partnership covering IT strategy, budgeting, vendor management, and system oversight to ensure alignment with organizational goals.



Managed IT Services

Comprehensive helpdesk and infrastructure support including device management, system monitoring, security updates, and day-to-day troubleshooting for staff.

TECHNOLOGY CONSULTING

Helping organizations align technology decisions with long-term goals and day-to-day operational needs.

- ✓ **Technology Assessments**
Evaluate current systems, security posture, and operational readiness to identify risks, gaps, and improvement opportunities before they impact service delivery.
- ✓ **Cloud Migration and Architecture**
Design and implement secure, scalable cloud environments. Strengthen infrastructure and support transitions to Microsoft 365, Azure, and other cloud platforms with minimal disruption.
- ✓ **Cybersecurity Evaluations**
Assess vulnerabilities, strengthen access controls, and establish practical security practices that protect staff, data, and client information.



OPERATIONS AND FINANCIAL SYSTEMS CONSULTING

Strengthening the processes, controls, and execution frameworks that support compliance, fiscal health, and day-to-day operations.



Business Process Analysis

Map current workflows across teams, identify gaps and handoff issues, and redesign processes that improve accuracy, accountability, and operational efficiency.



Fiscal Risk Assessments and Financial Systems Migrations

Support internal finance teams through fiscal risk reviews, system transitions, and operational readiness for platforms such as NetSuite, Sage Intacct, and MIP Accounting.



Workflow and Systems Optimization

Improve intake, billing, case or project tracking, and financial workflows through thoughtful process design, practical automation, and project-based execution support.

SOFTWARE DEVELOPMENT

Building, integrating, and supporting software solutions that scale with your mission and operations.

✓ Custom Software Development

Design and build tailored, production-grade applications that solve specific operational gaps, integrate with existing systems, and support long-term scalability and maintainability.

✓ Platform Integrations

Extend and connect platforms such as LegalServer, Clio, Microsoft 365, and other core systems to reduce manual work, improve data flow, and create more consistent reporting and workflows.

✓ AI & GPT-Driven Solutions

Design secure, private AI solutions including internal GPT tools and automation to support document processing, intake triage, knowledge retrieval, and data classification while maintaining confidentiality and control.

CAPABILITIES OVERVIEW

Service Offering	Key Capabilities	Examples of Deliverables
Technology Strategy Support	<ul style="list-style-type: none"> • Fractional CIO and executive technology leadership • CIO as a Service and IT governance • Managed IT services and operational oversight 	<ul style="list-style-type: none"> • IT strategy, budgeting, and multi-year roadmaps • Vendor management and executive reporting • Helpdesk, device management, and infrastructure monitoring
Technology Consulting	<ul style="list-style-type: none"> • Technology assessments • Cloud migration and architecture • Cybersecurity evaluations 	<ul style="list-style-type: none"> • Technology and security assessment reports • Cloud architecture designs and migration plans • Access control, data protection, and risk mitigation recommendations
Operations & Financial Systems Consulting	<ul style="list-style-type: none"> • Business process analysis and operational redesign • Fiscal risk assessments and financial systems migrations • Project management and cross-functional delivery support • Workflow and systems optimization 	<ul style="list-style-type: none"> • Intake, billing, and case workflow redesign and automation • Project plans, implementation support, and stakeholder coordination • Fiscal risk plans and accounting system migrations (NetSuite, Sage Intacct, MIP) • SOPs, reporting alignment, and internal controls documentation
Software Development	<ul style="list-style-type: none"> • Custom software application development • Integrations with LegalServer, Clio, Microsoft 365 • AI and GPT-driven tools 	<ul style="list-style-type: none"> • Custom client and partner portals • Automated document, intake, and triage systems • Secure private LLMs, integration modules, and analytics dashboards • Ongoing application support and optimization

BUSINESS VALUE

Delivering measurable outcomes that strengthen operations, reduce risk, and support long-term growth.



Operational Efficiency

Reduce manual effort and operational friction by improving workflows, eliminating bottlenecks, and helping teams get more done with less effort.



Risk, Security, & Compliance Readiness

Strengthen data protection, access controls, and system reliability to support confidentiality, regulatory requirements, and audit preparedness.



Cost Control & Smarter Investment

Improve visibility into technology and operational spend, reduce tool sprawl, and ensure investments align with real business priorities.



Scalable, Sustainable Infrastructure

Design technology foundations that remain stable as your organization grows, reducing rework, outages, and reactive fixes over time.

IMPACT

in

ACTION

Here are a few examples of how we've partnered with organizations to turn vision into impact:

Rapid IT Infrastructure Deployment *with Nation Law Firm*

Nation Law Firm contacted us for a quick turnaround to build their IT environment from the ground up. Our team was onsite within two days of the initial consultation, and we designed and implemented a solution tailored to their needs. We handled the hardware, Microsoft 365 setup, equipment procurement, and Intune/Autopilot configuration. Within a month, Nation Law was fully operational with a secure, modern infrastructure—now supported through our Managed IT Services.

Intwine Intake Platform with Community Legal Services of Mid-Florida (CLS)

A modern intake and scheduling platform integrated with LegalServer. Applicants can self-schedule consultations, receive reminders, and reschedule or cancel with ease. Firms gain analytics on engagement trends while improving access to legal support.

Eviction & Property Condition GIS Project with California Rural Legal Assistance (CRLA)

Using data from LegalServer, we developed a mapping tool on the ArcGIS platform that visualizes eviction patterns across San Joaquin County, CA. Heat maps and environmental overlays help CRLA identify vulnerable neighborhoods and guide advocacy for housing justice.

GPT Chatbot with Legal Services of North Dakota (LSND)

Built a private Azure-based LLM chatbot using SharePoint, Power Apps, and Power Flow. This solution provides automated legal Q&A; drawn strictly from secure, verified resources thus enhancing accessibility without compromising confidentiality.

Pro Bono Expungement App with The Access Project (TAP)

An expungement automation platform that evaluates applicant eligibility using a configurable rules engine and generates necessary court documents automatically. This system streamlines the expungement process and expands access to second-chance opportunities.



OUR APPROACH

Human-Centered. Secure. Results-Driven.

We start by listening—every project begins with understanding your mission and people.

We simplify the complex—turning fragmented systems into clear, efficient workflows.

We design for sustainability—secure, scalable, and built to last as you keep moving forward.

We operate as true partners—because your mission deserves more than a vendor.

WHO WE SERVE

Trusted by Law Firms and Organizations Nationwide

TechThinkTank partners with organizations that depend on secure, well-run systems to support their work. From boutique law firms to large, multi-location teams, we help clients operate efficiently, reduce risk, and scale with confidence.

Our experience spans technology strategy, systems design, and operational execution in environments where reliability, confidentiality, and accountability matter.



MEET SOME OF YOUR PARTNERS



JOSH LAZAR
CEO



CHRISTINA M MULLER
VP of Operations



CRAIG LOFTIN
VP of Technology & Customer Success



JERRY WAGNER
Client Partnerships Manager



MITCH STEIN
Dir. of Technical Services



MELISA BUENO-VEGA
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WILLIAM WILLS
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A passionate team of experts dedicated to driving innovation and delivering excellence.



Thank You

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