

Schofield Sweeney Case study

Achieving improved task efficiency with P4W



About Schofield Sweeney

This award-winning firm serves clients across the UK from their offices in Leeds, Bradford, Huddersfield, and London. They provide experienced advice and specialist legal services to individuals, businesses, and non-commercial organisations, and are often called upon to handle the most complex areas of law.

When the firm's previous practice and case management system reached end-of-life, their objective was to replace it with a highly configurable platform that would offer the ability to automate crucial, but time consuming, processes. After considering their options, they chose Partner for Windows (P4W).

Their Advanced experience

Schofield Sweeney wanted a new system that could incorporate current customised processes and data, and the tools to develop new, more efficient ways of working. Graham Sweeney, Managing Partner, explained how P4W's TaskCentre helped them accomplish this:

"P4W offers a level of business task automation that wasn't available to us before. Almost every week we're applying this technology to new areas of our business. Rather than plain screens of data, we've been able to customise screens and incorporate workflows that guide users through a process. It's much more engaging for staff, and the end result is accurate information, that's stored in the right place, in the correct format".

"Workflows have helped us incorporate improved risk management and client due diligence. File opening is now easier for fee earners, and support staff, and they can be confident they're following the right process when onboarding clients. Tighter control of risk has also been invaluable for our litigation team".

Automation has helped the firm provide employees with greater insight into their performance. Graham said:

"We have multiple ways to collect, access, and report data. It's about more than providing management information to our executive board - we can easily distribute information to everyone in the firm. Reports help people to manage their workloads better and track their own performance. Fee earners, for instance, can now concentrate on the most profitable work, and deal with the issue of dead time proactively".



"It's now much easier for our accounts team to manage the billing process. We've also automated our credit control activities and that's delivered an improved cash flow."

Graham Sweeney, Managing Partner, Schofield Sweeney

Why P4W?

One of the reasons was the wide breadth of third-party integrations available. We're already using a couple of the systems that our previous platform couldn't accommodate, including a client portal.

How is product support?

The resources provided online are very useful, and we've captured as much knowledge as possible to create an internal resource. We've also been really pleased with the knowledge and speed of response offered by the P4W support desk.

Whats next?

Our Advanced project manager stays in touch. We have a road map for further system development, so we're still working with the P4W team to make those happen.

We're also keen to take part in the P4W User Group. We know that the more active role we play, the more likely we are to see product developments that we'll want in the future.