

# Ratcliffe & Bibby Solicitors Case study

## P4W flexibility delivers smooth information access and improved risk management



### About Ratcliffe & Bibby

Located in northwest Lancashire, Ratcliffe & Bibby has provided independent legal services to their local community for more than 180 years. Employing the latest technology means they are now easily able to act for clients across England and Wales. With a staff of 30+ they offer a wide range of legal services and have established specialists in their Commercial, Family, Private Client, and Conveyancing Departments.

We spoke recently with Alistair Higham, the firm's Practice Manager, whose role incorporates business planning and the streamlining of work processes. In this case study he explains how P4W supports the firm's work.

### Their Advanced experience

**Ratcliffe & Bibby have been using P4W for 20+ years, and Alistair told us how P4W reports support him in managing the practice. He said:**

"P4W reporting has made my job easier by providing instant access to the information I need on a daily basis. I can quickly see which clients have had ID and AML checks, and confirm bank statements, or other required documents. I can now easily monitor expiration dates. I also look at the undertakings register regularly to make sure things are being discharged appropriately. This functionality saves hours of time."

**Alistair also explained how P4W helps the firm's fee earners work in a more efficient way:**

"The document history function is superb. Our fee earners can quickly record all correspondence and pull in precedence letters when they open a matter. They capture client information as soon as it's provided, using bespoke screens we've created. Once data is recorded, it can be merged into the precedent document. P4W's accounting system is also excellent; reporting is straight forward for fee earners when they can see exactly where housekeeping is up to, and what open files they have."

**New users also adapt quickly to P4W:**

"After a recent acquisition, we arranged online training for new staff. The trainer that Advanced provided was excellent, pitching the sessions toward those who hadn't used P4W before. After two half days, everyone felt it had been beneficial and were ready to start working on the system. We recorded the sessions and now use these videos during our induction process. Users are productive quicker and with less admin."



**"Using P4W, in just 2 or 3 clicks I can instantly see an overview of where risk lies in the firm, and what we need to do about it."**

Alistair Higham > Practice Manager > Ratcliffe & Bibby Solicitors

### Why P4W?

I like the ability to record, and recall, multiple types of information. The system is so flexible, with SQL experience, you can configure the programme fairly easily, so we've created bespoke workflows. The risk management side is also fantastic. P4W does exactly what we need it to, but it gives us the capability to do other things as well.

### How are things with Advanced?

After I started working with Ratcliffe & Bibby, I wanted to know who we worked with at Advanced. I received a call from our Account Manager who introduced himself and arranged a visit. He spent a day going through future product development and speaking to staff across two offices. He wanted to ensure they were using P4W in the most efficient way. We didn't have to pay for the extra support, he was being kind and helpful. I've never encountered that level of service before.