



Harrisons Solicitors modernises practice management with ALB from Advanced



Harrisons Solicitors formerly used Advanced's Legal Office practice management solution before upgrading to ALB in November 2015. The new system has given us much greater integration while generating significant time savings and improving the way that staff manage and use their time. In addition the automated Workflow and OverVu analytics modules have further enhanced efficiency and given us a better overview of the firm's performance.

Background

Harrisons has been providing legal services to the people and businesses of Mid Wales for over 170 years. We operate from a central office in Welshpool and in 2009 we opened an additional office in Newtown after acquiring another practice. We employ 34 staff across eight specialist departments including agriculture, estate administration and crime.

Improving integration to modernise service delivery

We previously used Legal Office as our practice and case management system but having used it successfully since 1995, we decided last year to upgrade to a more modern product. We wanted something that was capable of integrating with our other essential IT applications and which would enable us to operate in a more streamlined manner.

We did look at other providers in the market but we liked the integration and the workflows that you get with ALB. Because we had the existing relationship with Advanced, we knew that they were a reliable and trusted partner, and going with the same supplier also made the transition between the two systems smoother.

A fully integrated practice management package

ALB went live in November 2015 and is being used for managing client information, matters, billing, document management, time recording and diary management. The system also integrates with several other applications, meaning that our IT systems are much more joined up.

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Our Managing Partner, Anne Smith, says, "ALB touches everything we do, from our initial contact with the client to billing them. The integration with applications like Microsoft Word and our accounting software means that we are operating in a more streamlined way and makes it easier to track all the steps in the process."

ALB also integrates with Microsoft Outlook, which helps greatly as the majority of our correspondence now comes via email rather than by letter. For example, when someone sends an email to a client, they are prompted to save the email against the client's record and log the time, which is done automatically.

Greater visibility into firm performance

We also chose to adopt the OverVu analytics and reporting tool as an extension to ALB. OverVu is a real-time reporting tool which shows how the firm is performing at any one time. Before ALB we only produced reports on a monthly basis. They were also printed out and reviewed on paper. Moreover, we use the Workflow module which allows us to create automated workflows within ALB and truly make the system our own. For example, Advanced are currently working with us on a workflow for file auditing, breach reporting and client complaints. We previously used a separate piece of software for this, but now everything is integrated and in one place.

"As a solicitor dealing with very sensitive information, it is vital that we have a detailed insight into how the firm is performing and are aware of any complaints or compliance issues, so that we can quickly respond to them. The reporting tool and automated workflows in ALB make this much easier and help us to continue delivering a high-quality service to our clients." adds Anne.

Making better use of time

As well as improving integration and helping with compliance, ALB has generated substantial time savings by automating processes which were previously heavily manual and labour-intensive. Thanks to the complete integration that ALB offers, it has also improved the way that we record staff time.

Smith comments, "Solicitors sell their time so accurate and comprehensive capture of time is vital to our business. Previously there was work that wasn't being captured and our billing system was quite old-fashioned and paper-based, so staff were spending a lot of time filling in paper forms."

With ALB's time-tracking and the integration with programmes such as Outlook, we can bill clients more accurately and quickly, while staff can make more productive use of their time.

Meeting clients' expectations

Looking ahead, we want to continue adding modules with Workflow which will tailor the system to our needs and drive further efficiencies. It is important that you can fulfil your clients' requirements in the timely and efficient way that they expect, and ALB enables us to do just that.

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