



Beswicks Streamlines Client Onboarding with P4W and Adobe Sign

Saving time and paper by enabling clients to e-sign terms of engagement

We are a modern, leading law firm that is distinguished by our expertise and reputation in sports law, especially football. We have national and international clients, including some US soccer clubs, and have been named in the Legal 500 as one of the UK's leading sports law firms.

The challenge

Beswicks prides itself on being forward-thinking in all things, including technology. Tim Knight, our Business Operations Manager, believes that technology should be deployed whenever and wherever possible, with the aim to make processes simple and easier for staff and clients, and to save cost.

We have used P4W since 2015 but were still using procedures that generated a lot of paper. We knew that Adobe Sign could be integrated into P4W, and that this could help us introduce paper-lite methods and deliver several strong benefits to our firm.

The client onboarding process was one of the areas we identified where Adobe Sign could have a significant impact. Before any engagement can begin, each new client is required to sign a terms of engagement letter. This is to confirm that they are clear about the costs they'll incur once the firm starts working on their behalf.

The paper process was time consuming. We were printing these letters, posting them, and then waiting for the client to sign and post them back. We would sometimes have to spend time prompting the client to complete the process. When the signed letter was received several days later, it would be scanned into the client's file, while the original, physical document had to be securely disposed of.

Although critical to governance and compliance, this process was long-winded and incurred both staff and material costs. We also felt that it might not be what new clients would expect. It didn't feel very client-friendly to ask new clients to print out their own terms of engagement letter, then sign and return it. We wanted to communicate an important message to new clients about the type of efficient, straightforward service we provide.

The process

We were determined to achieve maximum automation and benefit from the implementation of Adobe Sign and this led us to building automated steps and triggers within P4W.

Our onboarding process now automatically sends a terms of engagement letter to new clients and then files the signed letter directly back into the client's folder.



Client >

Beswicks Legal

Sector >

Legal

Project >

Integrating Adobe Sign with P4W to streamline client onboarding

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Tim Knight >
Business Operations
Manager >
Beswicks Legal >

When the system detects that a letter hasn't been returned, a pre-timed reminder email can also be sent automatically to the client. This decreases the administration time required.

For audit, compliance and reporting purposes, whenever a new client e-signs into the system it automatically triggers the ticking and dating of a box in matter properties. This serves as a notification to the relevant fee earner that work can now start.

Once we were confident that all the functionality was in place and fully integrated, Adobe Sign was pushed out across the practice as an option for all new clients.

The impact

All the feedback we received about the P4W and Adobe Sign integration was good and new clients readily embraced e-signing.

Within two days of the rollout, we had a three-party agreement returned to us within 20 minutes. Now, despite the traditional way of signing still being on offer, no one is using it.

On average, that's 50 fewer documents for us to post each week, a total of more than 2,500 documents each year. It's made a real impact on the reduction of paper in the office.

Moreover, new clients are so quick to e-sign that terms often come straight back to us. This has transformed the process and matters can start

much more quickly as a result. The time savings are even more significant when onboarding international clients.

Adobe Sign also enables a single document to be signed by multiple parties at the same time, or in a predetermined order. This is extremely useful if a document needs to be signed three or four times by a client. The firm is finding that administration time has noticeably reduced, as have stationery and postal costs.

Beswicks has gained a full audit trail of each client's on-boarding process, and no longer needs to destroy signed terms of engagement securely to maintain data security compliance. The firm can also generate useful weekly reports showing how many new clients have signed in the last week.

Looking ahead

Now that Adobe Sign is yielding such positive results in this one area, we are looking at the potential of introducing additional automated applications. Included in our plans is the use of fillable PDF forms in Adobe Sign.

When you introduce new technology, you can't really be sure of the response it will get. On this occasion, everyone is very happy and all the feedback we've received has been great. We are very pleased with the beneficial impact Adobe Sign within P4W has had on our business and on client experience.

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