



P4W and Perfect Portal make GloverPriest a more efficient and transparent business

Midlands-based firm wanted to unify working practices while helping customers feel connected

GloverPriest aspires to being the largest independent law practice in the Midlands, even though we know that for any SME law firm, growth is a tantalising goal which also brings challenges.

Our firm is made up of eight previously independent firms, spread over three counties. We wanted to unify working practices across all branches and drive efficiency by bringing our workflow systems together. An example of the barriers we experienced relates to our crucial conveyancing work. It had a case management system, while our other work streams broadly did not.

We also wanted to maintain our role as a local, high-street firm and it was important that our customers still felt connected to their legal professional.

Our aim was to develop the business to become one of the region's top conveyancing firms, while at the same time maintaining a space where people can walk in and meet with their conveyancer face-to-face.

Transparency fix

Our central requirement was a system that could encompass everything from start to finish. One that tied our accounts, case management and conveyancing systems together.

We choose P4W as it was one of the only systems that covered all case management workflows and

had the ability to integrate with other systems. It has enabled us to have one system across all our offices and drive a consistent approach in the delivery of our services.

One of the keys to the project's success was the integration of P4W with Perfect Portal, which streamlines input from clients. Previously, quotes would be provided via Perfect Portal, but would then have to be processed in an Excel spreadsheet, Word document or even in an email. The process can now move from quote straight to creating the matter in half a dozen clicks.

This technology has provided us with transparency around workflows across all the practice areas we deliver; wills, probate, conveyancing and commercial are now all in one place.

It has also helped to keep the regulators happy. It sets us up to manage whatever is coming, from meeting SRA price transparency guidelines to justifying billing. We are now in the best position to efficiently manage compliance and any changes that may happen in the future.

Up, up and away

The improvements in efficiency resulting from the integration are also a benefit. Accuracy has noticeably improved and we are saving time. In the past, our legal secretaries could end up duplicating information as they had to transfer data by manually re-keying. Now



Client >

GloverPriest

Sector >

Legal

Project >

Unifying working practices across the firm with P4W and Perfect Portal

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Lee Salih >
Business Director >
GloverPriest >

that we've integrated, the process is seamless. Information is transferred straight from Perfect Portal, removing the element of human error.

Firm-wide, the results have had a significant impact. Our secretaries say it's saved them, on average, five to 10 minutes per case, freeing up approximately 5% of their working day. As the firm opens between 7,000 and 10,000 cases a year, we've gained a substantial amount of time savings.

The integration has led change throughout our firm. We've adjusted the way our end statements are produced for clients, to reflect the way information is shown in the portal. It helps our clients better understand the process.

With this improved billing format, that goes directly to our accounts department, we've been able to grow our business without having to invest in more people in our accounting department.

Building relationships

As well as allowing us to assess best practice for our workflows, integration presented the possibility of connecting a lawyers' work on matter lifecycles more directly with clients.

For example, we want to work with apps that will enable staff to update clients at key milestones. We are not quite at that stage yet but once it is implemented, clients will be able to track their case in real time.

The future

Just as success breeds success, so too does change breed change. Now we've embraced the integration and have seen the impact on the business, we want as many things to be integrated as possible.

We're planning to introduce other features that P4W enables, like Adobe Sign. Clients are used to digital documents, why not offer them if we are able?

Integrating P4W and Perfect Portal has also helped us realise our strategic goals. We've streamlined our processes and improved our legal service delivery in order to pave the way for our firm to become a leader in the region.

P4W has delivered a welcome evolution for us. It allowed us to bring systems together, knock down barriers between client and firm, and supported our teams in working together efficiently. We're not looking back.

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