



Knights discover a new way of working by using P4W and TaskCentre

An innovative approach to increase efficiency and deliver services that offer exceptional value to clients

At Knights plc, we serve clients across the full spectrum of legal and professional services, including dispute resolution, corporate, regulatory, wills and estates, conveyancing, family law and much more. As the leading UK consolidator of legal and professional services, we make decisions at a local level and cultivate a culture of transparency, putting people at the heart of everything we do.

Introducing a new way of working

As a part of our overall approach to working, we wanted to introduce a practice case management system that would enable our lawyers to do more for themselves.

During a P4W demonstration it was recommended that adopting TaskCentre at the same time as P4W, would enhance the functionality of the core system. We were told this would meet our objectives by automating the delivery of key information to our lawyers and managers, without them having to search for it manually.

It was obvious that our firm required software that would enable us to manage a client matter throughout the entire journey. P4W ticked all of the boxes by being able to provide access to client matters from any office, ensuring current documents were available and enabling lawyers to produce a bill.

We believed this technology would also provide the ability to successfully manage client relationships. Whenever a client contacted us, we wanted our lawyers to be able to access information in real-time and not have to rely on someone else to explain the matter.

Nigel Johnson, our IT Director, explains: "We were clear about our expectations of the P4W / TaskCentre combined solution. We wanted to provide visibility of information to key personnel and lawyers so they could take ownership of their client relationships more effectively."

Automated information alerts

TaskCentre offered us automated alerts and report delivery, based upon the specific information each user would need. For our lawyers, it highlights where actions need to be taken, such as an overdue bill, so issues can be quickly solved.

Management teams also receive financial updates. Daily summaries for new matters opened, and the amount quoted, allow us to ensure fees meet expectations, and to provide support to colleagues when needed.

By collating information and delivering it directly to those that need it, process efficiency has increased, communication channels remain open and everyone has an improved view of client matter progression.

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Client >

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Sector >

Legal

Project >

Implementation of P4W practice case management and TaskCentre

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Nigel Johnson >
IT Director >
Knights plc >

Informed decision making

We use TaskCentre as a tool to encourage people to engage directly with clients, rather than as a means of saying they've not completed something. It is used to identify issues or bottlenecks so we can put improvements in place. It's allowed us to open up dialogue and that's built confidence in being able to follow-up appropriately and proactively.

While the big focus of this solution is on people, both internally and externally, there is also a financial element that comes from the wealth of information available in P4W.

Nigel explained, "Ultimately, we're able to use the information we receive to forecast financials. On average, turnaround on matters is three months, so we can see what we've quoted for and have visibility of what we can expect to achieve."

Achieving more, with less

The amount of data that's now automatically monitored, formatted and delivered by these solutions would not have been possible through manual creation.

Nigel asserted, "To achieve what we do now, we would have needed a minimum of two people, working full-time, just to prepare this information. That's only for the daily tasks. I couldn't even quantify the resource that would be required to manage other instances, such as a file going beyond a due date."

There's also a substantial amount of automation through reports and locking of matters. From a compliance perspective, we would have needed a much larger team to handle that if we didn't have the automation that TaskCentre provides.

Benefits at every level

TaskCentre works diligently in the background, ensuring all of our employees are kept up-to-date. The management team now benefit from top level reports and 100 other colleagues, with team leader responsibilities, also receive relevant daily reports. Furthermore, around 500 lawyers are now equipped with the information they need every day.

We've found TaskCentre to be well worth the investment. Beyond initial use, once we started to become familiar with the product, we began thinking about additional tasks and processes. With over 80 upcoming projects, input from various areas of technology are required. Whenever tasks require automation, TaskCentre is the first option to be explored.

The challenge

- Implement practice case management
- Automated delivery of key data to staff
- Lawyers developing client relationships

The solution

- Automated delivery of management reports
- Automated summaries of new matters opened, status of work etc.
- Monitoring systems for overdue bills

The results

- 500 lawyers receive daily updates
- 100 team leaders benefit from automated reporting
- 10 senior employees receive automatically generated top level reports
- Information enables successful forecasting
- Increased levels of client engagement

More information

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