



Trethowans win the case with intuitive dashboard reporting solution

At Trethowans we have successfully implemented Advanced's OverVu solution in order to benefit from intuitive dashboard reporting and gain real insight into our firms' current performance.

Background

Trethowans is a UK top 150 law firm with a team of over 200 people, including 35 partners. Our firm has been established for over 150 years and has offices in Southampton, Salisbury and Poole. We offer a comprehensive range of services representing global household brand names, entrepreneurs and major regional employers. We pride ourselves on the high standard of service we offer ensuring customers are provided with excellent service and value. Our dedication and focus on client service has led to us being Lexcel Accredited.

The need for easily accessible information

As our firm grew the importance of getting easy access to business information became paramount. Partners, departmental heads and fee earners all needed access to the key business metrics and performance indicators we use in a straightforward and timely manner. That quickly became a significant challenge and we realised that we needed an enterprise dashboard reporting solution which would allow both management and fee earners to gain real

insight into their performance and monitor progress in an accessible way.

Andy Duckworth, our Finance Director explains: "There was nothing else available which offered this level of information in this way, so OverVu was the obvious choice."

"We wanted our fee earners to have readily accessible information. The information has always been available, but was traditionally generated by accounts and had to be requested on an individual basis. By putting the information at the fingertips of fee earners, we can ensure they have all the data they need to evaluate where they are and manage their own performance."

Simple to use and fully configurable

For us, we wanted something that would be simple to use, web based and easy to configure- something that would enable us to drill down into the data and get the detail we really needed. **Andy continues:** "We wanted a system which we could customise, not every firm wants to look at the same thing, so we wanted to be able to take the product and configure it in a way which

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suited us and our partners, designing it to give everyone the information they wanted to see."

"Training sessions are ongoing to make sure staff get the most from it, for example being able to put reports into excel and filter them to look at exceptions rather than just blank figures. The fact that the product has been configured to give everyone access to the information they require means that OverVu is really highly regarded within our firm."

"It is very simple to use and each fee earner is fully trained when they join the firm to make sure they can get the best out of the system. 98% of people find the system extremely simple to use and we find it worth our time to make sure everyone has the correct level of in-house training to feel confident in what they are doing."

Less paper, more accountability

Andy says *"We no longer need to print off reams of financial reports, which although is not a primary benefit, is certainly better from an environmental point of view. There is a lot less paper drifting around the office as everyone has access to the relevant reports on screen."*

"From a financial point of view, OverVu has not changed the capabilities of our fee earners, but having given them the correct tools in OverVu to help them and push them on, it has taken away the excuse of not being completely up to date on performance metrics."

"Having a system which gives them all the information they need means that fee earners can be entrusted to monitor their own progress, knowing they have all the relevant, up to date information they need. It makes them much more accountable."

Continuing to add value, year on year

"We have taken the OverVu product further on from fee earner performance to having it look at some of our P&L activities as well."

"We have improved it to collate our marketing analysis and spend, so that each team can see how much they have spent, updated automatically from the ledgers each evening, rather than teams having to ask the marketing or finance department directly each time."

Doug Hargrove, Managing Director of Advanced Legal adds *"Trethowans have always been a forward thinking firm, with a tight grip on the financial realities of running a law firm. Working in partnership with them, we have been able to ensure that as their business changed and their management information needs evolved, OverVu has always been able to deliver that information in a timely and efficient way."*

Having now used the system for a number of years we have become an advocate for the benefits of OverVu and have been keen to communicate these to other legal firms we have connections with. **Andy continues:** *"We have recently demonstrated OverVu to other firms, who were extremely interested in what the product could do for them. We are very keen that other firms realise the benefits, and have been happy to show people the system. Although offering demos is an investment of our time, we have often found it useful as other people will ask questions and suggest modifications which help us improve our own use of the system. We are really delighted with the product and I really can't see how we would manage now without it."*

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