



P4W and TaskCentre help FDR improve efficiencies around credit control, marketing and compliance

75+ automated key tasks ensure the firm saves time and costs, achieving more without increasing resources

Forshaws Davies Ridgway (FDR Law) is a Cheshire based, Lexel-accredited law firm. We have 130+ employees who offer comprehensive solutions to commercial and private clients in all disciplines. The origins of the company date back to 1750 but today, we've combined our traditional values with a forward-thinking approach to using the latest legal technologies.

Controlling tasks

As with many firms, managing the large volume of small administration and compliance tasks associated with matters has presented some problems for us. Credit control is a good example of this. Allocating sufficient resources to each fee earner to complete this process would have resulted in a large overhead. Expecting lawyers to do this work themselves could lead to late or uncompleted tasks. With aged debts increasing, this was a concern we wanted to resolve as quickly as possible.

Aiding compliance

Keeping on top of compliance regulations is also of paramount importance and we wanted an efficient way of identifying, and dealing with, data anomalies within P4W. These included missing or incomplete data, rejected posting slips, unbilled time, money remaining in clients' accounts, high risk cases and KPI overruns.

Remodelling marketing efforts

It was also identified that help was required with marketing. We wanted a way to send targeted messaging, that would trigger audience engagement and increase sales, while reducing the time spent on marketing tasks.

The brief

We needed a system that satisfied our automation and alerting requirements, and integrated smoothly with P4W. TaskCentre was first on our list. It met all of our core qualifications, was easy to use and also provided the future-proof flexibility we wanted. Because of this, we felt there was no need to look at alternative systems.

Credit control, under control

Credit control was the first area we addressed. A series of tasks were built and deployed to enable a smooth, automated process where daily, pre-scheduled tasks look for issued bills, their age and payment status. Reports are automatically generated and at the appropriate time, a letter is sent to the client, asking for payment. Unpaid bills generate a series of reminder letters and, if the account remains unsettled, email alerts are sent to the fee earner and aged debt department. This gives them the opportunity to help resolve any issues quickly.



Client >

FDR Law

Sector >

Legal

Project >

The integration of TaskCentre automation into P4W practice and case management

"Our philosophy is to provide our clients with outstanding legal services that are built around their needs. Giving a tailored personal service is very important to us."

David Wood >
Chief Technical Officer >
FDR Law >

TaskCentre also identifies when payment plans have been set up on specific cases and monitors the ledgers to ensure that the agreed amounts have been paid on time each month. If the agreement is broken, the credit controller is alerted via email so immediate remedial action can be taken.

By improving the credit control process, we can react more quickly to unpaid bills and this has resulted in a reduction of aged debts. The numerous alerts in place also means that fee earners no longer miss windows of opportunity to interim bill.

Automated non-compliance alerts

TaskCentre has also helped us keep on top of compliance regulations. Typically, issues arise when something has been overlooked and the data in P4W is incorrect or missing altogether. When this happens, TaskCentre automatically sends an email to the relevant person asking them to investigate and to make any corrections that are necessary.

Successful, data-driven marketing

We've also been able to increase revenue by using TaskCentre to launch a new, targeted marketing approach. Tasks that previously took two people, two days, can now be accomplished daily, with no overhead costs. Numerous marketing schemes are run constantly, a few of which are outlined below:

- providing information on our investment management division to clients who've just received a large sum of money
- contacting first-time buyers, two and a half years after initial purchase to see if a further move is planned
- asking clients who've recently completed a house purchase if they require a new will

We've been able to identify many instances where marketing tasks would have taken so much time to do manually, they simply wouldn't have been attempted.

More information

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An illustration of this is TaskCentre identifying wills that were last produced five or ten years ago, that haven't been renewed or altered since.

Now, a letter is automatically printed and sent without anyone in the private client department having to get involved, saving time and costs.

IT cost savings

Previously, analysing business requests, extracting the data, and manually manipulating it into user-friendly documents, would have required two full-time data analysts. TaskCentre has removed the need for this resource, saving an estimated £50k per annum.

Future savings

Although there is a move towards emailing documents to clients, there are still many that need to be posted. We intend to improve the efficiency of this process by using TaskCentre to automate the creation and printing of as many documents as possible. This will undoubtedly save additional time and money.

SharePoint integration

We use SharePoint to hold documents and records, including compliance forms. We plan to use TaskCentre to monitor the P4W database for specific infractions and then issue the correct versions of the compliance documents directly from SharePoint. This will ensure our fee earners always use the most up-to-date forms.

Firm-wide benefits

Every department has been touched by TaskCentre and the benefits have been widespread. More than 75 tasks are currently in place and each one contributes in some way to the overall time and monetary savings made.

Many employees don't even realise TaskCentre exists as it runs so efficiently in the background. All they know is that there are jobs that no longer need to be done and that they are sent a reminder email whenever there is an action that they need to complete.