



## Consultancy and Training Passports

Get all of the benefits of an in-house product expert,  
at a fraction of the cost

### Support for your firm

Our Consultancy and Training Passports are designed specifically to help your firm get the most out of your Advanced solutions. They help to develop confident users who understand how to get the most efficient performance from systems they depend on every day.

This service provides you with a pre-set number of days during which you have access to our technology experts at a reduced rate. You can schedule the days to be taken all at once, or you can schedule days throughout the year, whichever option works best for your firm.

### Our customers use these passports to:

- Maintain their system knowledge
- Learn about new product features or functionality
- Ensure continuous improvements following their initial training

### A bespoke approach

As you work together, your personal training consultant will gain a comprehensive knowledge of your business processes. Understanding the way you work will help them ensure your firm gets the maximum benefit from all of your Advanced solutions.

Whether you need user training, an experienced person to implement a new enhancement or module, or assistance in configuring a system to meet a specific requirement, we can offer the help you need.

### Increase adoption with user training

- New starters
- Refresher courses
- New modules / versions

### Create efficiencies by streamlining processes

- Automate repetitive tasks
- Automate reports
- Customise forms and templates

### Benefit from a system health check

- Discover the full spectrum of functionality that your platform can offer
- Optimise performance, based on your firm's specific processes
- Get hands on support for upgrades or new module implementations
- Gain a competitive edge from higher levels of time savings and efficiency

### Product >

Consultancy and Training

### Sector >

Legal

# Getting the most from your systems investment



## Masson & Glennie

This firm finds their Training Passport gives them the benefits of a full-time IT person. The option saves them thousands of pounds a year while providing an experienced and highly-trained consultant to manage their system requirements.

They see their regular consultant as an invaluable additional member of the team who relieves the firm of the need to employ extra administration staff.

## Significant time savings gained

A Training Passport created the opportunity for Bell & Buxton to put an adequate focus on systems development. As a result, the firm has been able to develop P4W at a meaningful rate, and to introduce some significant improvements that make the most of the technology they've invested in.

Bell & Buxton do not have an in-house IT person, so having someone to write workflows and case plans for them has enabled users to concentrate on the work they're qualified to do. They report that having a dedicated professional helps them get the best from technology and has made them more efficient.

The firm reduced their fees to clients, due to the time savings made, but had still achieved an increase in LPA fees of 135% in just 6 months

*"With the work done on setting up Task Centre during the Training Passport days, our credit control results have improved. Comparing debts over one month old to annual fees from two years ago to today, we have seen a reduction of 15.9% in this ratio."*

Ian Mitchie > Practice Manager >  
Bell & Buxton, Solicitors >

## Gaining efficiency

Beumont Legal initially chose to use one passport day per month, but because of the value they received, they tripled their commitment. Each month they collate a list of items they want to review. These may include anything from process improvements to the implementation of a bespoke development that makes their firm's processes more efficient.

*"I have no doubt we could do the majority of this in-house but it just takes time that we sometimes don't have in our day-to-day operations."*

*"To have someone at our disposal, who knows the system inside out, to make changes that help us realise the potential of our case management system and our investment in it, is brilliant. For those contemplating taking passport days, I would recommend doing so."*

Nicholas Masheder > Partner >  
Beaumont Legal >

To find out more about Consultancy and Training, please speak to your Account Manager or **Contact Us**

## More information

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