

A horizontal banner at the top of the page features a prehistoric cave painting of various animals, including a horse, a deer with large antlers, and a bison, rendered in earthy tones of ochre and brown. The word "CASE STUDY" is overlaid in large, white, sans-serif capital letters on the right side of the banner.

# CASE STUDY

## **Pert & Malim Case Study**

Pert & Malim solicitors in Grantham could be described as a traditional, family-run high street firm, providing legal services, house moving, probate and litigation of all descriptions, as well as taking on commercial work. They would not describe themselves as high-tech, but like most practices, they are very busy, so wanted to ensure that they were being as efficient as possible in their processes. The selection of OchreSoft to help their conveyancing business has had a tremendous impact - not only on efficiency, but also on improving customer service.

When Sarah Pert received the call from OchreSoft, Pert & Malim had already made the decision that they needed a new system. They had researched the market and had a good idea what was on offer for small businesses. What they hadn't counted on was how impressive the OchreSoft solution was. In fact they were so impressed that they committed to buy OchreSofts' conveyancing solution ICON within twenty four hours of seeing the demo.

## **Worth the wait**

Having made the decision that OchreSoft was the right solution for them, Pert and Malim then went through the process of updating their technology ready for implementation. "Once we had made the decision we were keen to get started. However, we soon realised that we needed to update our technology as well as our IT skills!" explains Sarah Pert, Principal, Pert and Malim Solicitors. "This was something we had been planning on doing but not quite got around to, so this was a good impetus. We were soon up to speed and it was worth the effort. We had one day of training on the basics and since then we have just got on with it. We started off with just two fee earners using it and now we have two fee earners and four secretaries on the system. The software is very intuitive, so we have been able to add new users and train them ourselves."

## **Continually progressing**

"The great thing about OchreSoft is that they are always working on improving the system and adding new templates – so you can trust that you are meeting the latest standards" continued Sarah. "We recently upgraded to their latest offering – ICONexpert which is amazing. We have been using the system for almost two years and thought that it was user-friendly before. However, it is now even better."

*"ICONexpert makes our working day easier. Information is on hand in an automated system. If you are very busy, as we all are, it makes a difference to your stress levels! We are really pleased with our selection and couldn't do without it. If we can use it, then anybody can!"*

**Sarah Pert  
Principal  
Pert and Malim Solicitors**

*“Implementing OchreSoft  
ICONexpert has been one of our  
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**Sarah Pert  
Principal  
Pert and Malim Solicitors**

## **Everyone is different**

ICONexpert offers Pert and Malim a great deal of flexibility explains Sarah: “We all use it differently within the practice. The other fee earners does everything herself, whereas I tend to dictate changes to my secretary. It is simple, whichever way you use it. The biggest benefit is that it has really streamlined our systems. We also have the peace of mind that if we have any technical queries, OchreSoft are on hand and have always been very responsive.”

## **Return on investment**

“Implementing OchreSoft ICONexpert has been one of our best decisions. It has really transformed how we work” enthused Sarah. “It is not just saving us time, but minimising our risk of error. The comprehensive database of standard letters and forms for sale and purchase transactions, save us a significant amount of time. What’s more, the pace of change in conveyance legislation has made it very hard for small firms to stay up to date. OchreSoft guarantees compliance, relieving us of that worry.”

## **Saving time and money**

ICONexpert has reduced the total time that it takes Pert & Malim to complete a conveyancing case. “Everything is set up within the system, so I estimate it has freed up between 25 and 50% of the secretaries time from inception through to completion on a conveyancing case. This is great on two counts as we are more efficient and I think we have probably increased our fees as a result. We are aware of how much we charge and what it costs us to use ICONexpert for each case and it is definitely value for money. We are now looking at moving towards e-conveyancing.”

## **Improved customer service**

Pert and Malim are convinced that the service they offer their customers – both clients and estate agents has improved massively. “ICONexpert is provided as a web application which means that anyone in the practice can access it. This means that if someone is out of the office, and we get a query, any of our users can look online and see at any moment where any particular case is up to. It also prompts us to check on the progress of cases. Everything is on a single screen so it’s really easy.”

## **Making a difference**

“ICONexpert makes our working day easier” concludes Sarah. “Information is on hand in an automated system. If you are very busy, as we all are, it makes a difference to your stress levels! We are really pleased with our selection and couldn’t do without it. If we can use it, then anybody can!”