

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 this banner.

CASE STUDY

Wilson and Berry Case Study

As a small practice in Bracknell, Berkshire, Wilson & Berry Solicitors has been providing legal services for over 150 years. It is one of the few firms in its catchment area offering Legal Aid, but some 65-70% of its business is directly related to conveyancing.

Bracknell is on the M4 corridor between London and Bristol and offers a rich and constant stream of property transactions. Domestic and commercial properties change hands quickly, and new build projects are putting more and more demand on legal firms that offer conveyancing. However, the market is competitive and with twelve employees, of whom four are partners, supported by one legal executive, introducing any technology at Wilson & Berry needed to have a positive impact on the efficiency of the firm's services.

Conveyance process improvements gain business edge for firm

John Hare, Conveyancing Co-ordinator at Wilson & Berry says that accepting technology as a legitimate way forward was a big shift for the firm: "We had tried using conveyancing software in the past, but it wasn't very well received, mainly because we were not culturally ready, it was easy for people within the firm to reject it. I was confident that technology could make a difference, so when we tried again with OchreSoft, I was determined to make it work".

"The big difference with OchreSoft's solution is that it is very intuitive, and is clearly designed by people who have a deep understanding of conveyancing – which meant we could just get on with using it. Once everyone started to see the benefits, we quickly began to accept technology as part of our working lives."

John was key in driving this change into the business and acted as guinea pig in the first instance, proving that OchreSoft's clear and friendly interface really was easy to use. "Moving to an electronic system was, culturally, very painful," admits John, "but once everyone had committed to the change, and could see the difference it made, the outcome was positive in every measure."

That was two years ago, and more recently Wilson and Berry have upgraded to OchreSoft's ICONExpert. Now with five regular users – two fee earners, two secretaries and John - the firm is much more effective at servicing its clients. And the system is not exclusive to the principle users either as all employees, and locums, can have access

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to the system - ensuring that everyone can see exactly where any transaction is up to at any time. This provides added benefits as John explained: "If we get a call from an estate agent, for example, anyone can answer the question, which means there is no need to worry the fee earner. This is very useful for all of us."

Impact on the business

OchreSoft develops its solutions in two ways: a well structured and intuitive workflow framework that imposes good discipline on legal firms, along with a comprehensive database of forms and standard letters related to sale or purchase transactions. OchreSoft's Sales Director, Michael Swift, says, "Legislation changes so fast that it is hard for firms to remain up to date. We guarantee compliance so that firms are relieved of that burden." John Hare confirms the benefits. "ICONExpert has helped to consolidate the business. What was once two disparate departments, working independently one from the other, can now work together. We use the same documents and processes, making sure that the work we do is more effective for both us and our clients."

Since introducing ICONExpert, John says that the volume of the work that the firm handles has also gone up. "We have increased the number of projects on the go since implementing ICONExpert as well as speeding up the process. From a client perspective, they get the initial documentation much more quickly as the initial letters are already set up – this means we can get them sent out the same day". In among the business benefits is the vitally important ingredient to OchreSoft's success; "We like the clear interface and the fact that it is so intuitive. It is not at all convoluted," confirms John.

Saving money, improving service

In the past, maintaining documentation compliance at Wilson & Berry was a cumbersome and expensive process. John states the case simply: "It used to put heavy demands on our fee earners time, time that is better spent advising and not checking paper work. ICONExpert is a useful tool that relieves fee earners of that problem, and it certainly makes all our lives easier."

In summation, even the culture change was welcomed. "ICONExpert is a product which drives you along the conveyancing process and steers you in the right direction," concludes John. "We've certainly not been disappointed."