



Case Study

Dee & Griffin Solicitors

Introduction

Gloucester-based Dee & Griffin may be the classic traditional High Street firm in terms of its breadth of private client services but it has also worked hard over the past decade to differentiate itself through its commitment to customer service. An exceptionally high level of referral work and repeat custom testifies to the success of such an approach, which is further complemented by the firm's progressive take on business development which embraces networking, marketing and technology.

One of the major challenges the practice has faced in recent times has been the preservation of its quality standards in the face of a changing legal landscape and treacherous economic climate. When practice manager Hamish Mason joined Dee & Griffin in 2006, it was at a time when risk management was first making its weight felt and firms were looking at how to better foster a culture of compliance within their operations. The more forward-looking firms also had at least one eye on positioning themselves better to cope with any downturn. We talk to Hamish about the role Intelliworks has played in helping Dee & Griffin respond to regulatory pressure and market dynamics.

What was the background to the adoption of Intelliworks?

"Conveyancing, with its high-risk profile, was an inevitable target of the heaviest regulation. To maintain and indeed build on the success of our conveyancing department, to work to consistent service standards, and to sustain quality delivery in this new more complex arena, we knew this would demand changes to existing working practices. At the time the team all managed property cases in a slightly different way, with fee earners using their own personal banks of precedent documents. That impacted on the firm's efficiency, with resources becoming stretched in busy times due to the heavy administrative burden of each matter. With no centralised system if a fee earner was away or ill, it was difficult for a colleague to pick up and run with the matter in their absence, which was compromising the customer experience.

We knew that the answer lay in deploying a workflow system of some kind but we were wary of so-called "out of the box" products that were no more than toolkits. What made us decide in favour of Intelliworks was that it completely bypassed the need for us to do anything other than to get on and use the system! As a multi-tenant Cloud application, OchreSoft manages the legal process, precedents and forms and delivers it to us as a ready to go web-based service. At a stroke, we had in place enabling technology that allowed us to streamline operations, embed consistency, compliance and risk management into the conveyancing department, and facilitate the scaling up or back of resources as market conditions dictated.

How would you describe the move to the Intelliworks platform?

The project started with clear goals and end users were fully bought into the benefits for them personally as well as the whole firm. In terms of implementation and training, this was planned and shared well in advance and ran smoothly with good feedback from fee earners and secretaries alike. Because of this groundwork individuals did not feel that case management was a threat, but rather that Intelliworks would support them, freeing them from repetitive tasks to focus on the higher value activities of customer contact or new client acquisition.

dee&griffin
SOLICITORS

OchreSoft has developed
Intelliworks™, legal
software to transform the
way you work...

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What has Intelliworks™ delivered for the firm?

Five years after its initial deployment our conveyancing department is thriving. It has weathered the recession, with volumes recovering in 2010, growing in 2011 and on target to grow for the third year running.

Compliance reports enable us to monitor risks and exceptions effectively whilst our consistently high quality output and 24/7 online tracking facility are helping secure new relationships with providers of work such as local agents. The streamlining of the operational processes means that the team can easily cope with changes in demand, and we are now fully joined-up, providing a seamless service to any customer across any office in times of sickness or holidays. More specifically, the management information we get out of the system has assisted with a recent SRA Thematic visit, PI renewal and CQS accreditation.

What's the final verdict?

I think that's best summed up by the feedback we get from clients: we're rated after every transaction and we consistently score 10/10. This feedback is proving a powerful sales tool. It is also used in all our advertising, which highlights too the 24/7 online case tracking which is drawing in a new generation of clients. That we are now in such a strong position is testament to the power not just of the technology but also the right IT partnership - OchreSoft has always been responsive to our ideas and worked with us to produce the reports and refinements that we've needed to drive performance.

Tangible benefits delivered:

- Major efficiency and productivity gains thanks to clear processes and readily available precedents
- In-built disaster recovery and protection of client data through use of hosted model
- Time freed up from administrative burden reinvested in optimising customer experience
- Online case tracking provides a real differentiator in the battle to win customers
- Comprehensive audit trails and risk monitoring ease compliance burden vis a vis SRA and CQS
- Demonstrable commitment to risk management aids PII renewal negotiations

At a glance

- We are an independent software company founded in 2003
- The team comprises qualified lawyers, underpinned by highly skilled technologists and support staff
- OchreSoft develop expert legal workflows and updates are fully automated covering legal processes, precedents and forms
- OchreSoft Intelliworks™ is delivered as a secure managed Cloud application, significantly reducing the cost of ownership

Intelliworks™ Conveyancing

- End to end process management from initial quotation to post-completion
- Integrated AML, Client ID and on-line SDLT submission
- On-line case tracking and SMS milestone texting
- Lexcel and CQS specific process and content
- Management reporting
- E-mail and document management
- We manage some 700+ precedents and forms so you don't have to

Intelliworks™ Probate

- Workflow, legal content and accounting
- Seamless production of IHT205/400 forms
- Probate Estate Accounts to STEP guidelines
- Underpinned by full double-entry accounts
- Complex asset distribution at the click of a button
- Email and document management
- We manage some 450+ precedents and forms so you don't have to

We currently supply 150+ UK law firms, and are growing month on month, as legal service providers embrace modern IT models and recognise the value in unique solutions such as Intelliworks™ to assist with productivity and compliance.

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