

NEXT GENERATION WORKFLOW SOFTWARE FROM FLOSUITE LEGAL



CLIENT BACKGROUND

IBB Solicitors (Iliffes Booth Bennett) is West London's leading law firm and is recognised in The Legal 500 as a South East regional heavyweight. They are a full-service law firm handling complex legal work for both businesses and individuals across four main practice areas - Real Estate, Commercial, Private Client and Community Legal Services.

They have two offices across the South East and Thames Valley giving IBB a comprehensive coverage of the region. There are 27 partners, 75 qualified lawyers, fee earners and consultants, and 165 people in total.

THE TEAM

A project team was established comprising of the IT Director Ian Barrows, Development Analyst Fiona Warner, IT Trainer Michelle James and IT Analyst Daniel Airende. The team worked closely with FloSuite Legal's Project Manager and implementation consultants to document the solution's requirements, design a technical solution and deploy to the firm's lawyers.

THE CHALLENGE

IBB Solicitors had a legacy Lexis Nexis Axxia Practice Management System (PMS) and Arista Case Management System (CMS) which although it had delivered significant benefits to the firm in the past, it was starting to show its age from a user interface perspective and was based on a no longer supported technology platform. Because of the age of the existing PMS (hosted on a Unix server with an Informix database), no direct Application Programming Interface (API) was available to insert the clients or matters in real time.

After purchasing and successfully implementing Autonomy iManage, a best of breed document management system (DMS), the firm decided to look for a single, flexible framework solution that could address system integration, workflow, document assembly, case and general matter management requirements. This solution aligned with the firm's goal to roll out desktop upgrades which included Windows 7 and Office 2010.

Rather than causing massive disruption to all of their departments, the firm wanted to gradually replace the lawyer's desktop application with a modern, flexible web-based solution while still retaining the legacy Practice Management System for its core accounting functions. As department specific workflow maps were implemented, the legacy Case Management System would be retired.

SOLUTION

IBB Solicitors selected Thomson Reuters' FloSuite Legal as the solution which provided a Client/Matter Inception process, FloCase Case Management System and FloTimer time recording application. The key functional areas were:

- A modern fully integrated extensible platform for the firm's staff to develop and enhance work type specific solutions
 - Leveraging the different systems within the firm into a single streamlined modern looking user interface for the lawyer
 - An almost real-time batch processing system was developed to insert the client, matter and time data in to Axxia.
 - A Client/Matter Inception (and maintenance) process used by fee earners to insert/update validated data in Axxia.
 - Creation workspaces in iManage DMS as part of the Client/Matter Inception process .
 - Creation of a work-type specific case console using FloCase upon completion of the client/matter inception process.
 - Document template house styles upgraded and bookmarks/field codes defined for document construction.
 - Case documents held in the matter's iManage workspace were shown in the case console.
 - New case contacts could be added along with existing contacts an integrated CRM system.
 - FloTimer, a time recording application, was developed for the lawyer to launch from their desktop or from the case console.
 - FloOffice, a Microsoft Office plugin, allowed users to upload emails/attachments directly into a case.
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BENEFITS REALISATION

The key benefits of the solution are as follows:

- The IT department were able to proceed with their roll out of upgraded desktop environments to the lawyers without replacing or upgrading the Practice Management System.
- Client and matter document workspaces in the DMS were available instantly as part of the CMI process rather than waiting for an overnight creation process.
- Improved data quality and integrity through workflow and stricter on-form data validation
- Single point of entry for all departments to see the active cases and pending tasks.
- Quicker entry of matter contacts by reusing contacts from the client's other matters.
- A case-based Contact Relationship Management (CRM) system to associate contacts with a case, assigning their role within the case and relationships to other contacts.
- Automation of document generation using predefined templates and case data, stored into the appropriate matter's DMS workspace.
- Reducing risk by FloCase providing a full audit history allowing staff to see who and when actions were performed on a case.
- Minimising risk associated with a major systems change by the phased introduction of FloCase.