

# TURCAN CONNELL DEPLOYS FLOSUITE LEGAL NEW CLIENT MATTER APPLICATION IN 12 WEEKS



## SCENARIO:

Turcan Connell wished to enhance existing IT assets and business processes through the deployment of a flexible BPM solution. The firm required to integrate disparate systems and processes, rationalise multiple processes used to achieve the same tasks, and improve data cleansing procedures. FloSuite Legal BPM was selected to achieve these goals within a 'go-live' timescale of less than three months.

Turcan Connell's internal IT team, in conjunction with FloSuite Legal consultants, were tasked with delivering two key target benefits for the business: 'smarter working' and improved knowledge management. Client and Matter Inception, Client and Matter Editing and other related applications were the initial areas identified for the FloSuite Legal deployment.

---

## CLIENT BACKGROUND:

Turcan Connell is a leading private client firm providing legal, financial and charity services, with offices in Edinburgh and Guernsey. With a staff of over 250, it is a rapidly growing and dynamic firm, having doubled in size every year since inception.

Turcan Connell brings together a combination of skills and expertise unique in Scotland. These cover asset protection, land and property, succession, taxation, family law, employment law, litigation, trusts and charities, and also investment management and personal financial planning, where the firm controls around £700m of funds.

---

## IMPLEMENTATION:

The first FloSuite Legal project involved the deployment of improved business processes for Client and Matter Inception, Client and Matter Editing, and other related applications. In line with broader IT strategy for 06, Turcan Connell first upgraded their existing Pilgrim LawSoft Practice Management System to the latest release and removed their in-house bespoke Web applications, which were undocumented and time-consuming to support.

Turcan Connell's in-house IT team worked closely with a FloSuite Legal consultant to define and deploy the Client Matter Inception process within FloSuite Legal BPM, including extra functionality to meet specialist requirements.

Turcan Connell successfully deployed the FloSuite Legal BPM solution to manage New Client and Matter Inception processes in a total project timescale of just 12 weeks. This included business analysis, process implementation, UI configuration, 'look and feel' and a first time integration with the Pilgrim Practice Management System (PMS), delivering a highly sophisticated application.

---

## BUSINESS BENEFITS:

Bronwen Jeans, IT Development Manager, Turcan Connell, said: "We were on tight timescales for the project and needed to work with a product that would allow us to rapidly deploy what was a highly complex business requirement in a short period of time.

"We ruled out embedding process rules directly within the practice management or other backend systems because of the quantity and complexity of technical development required to do this. Also, this approach could not deliver the capabilities and level of flexibility we required.

"We needed an independent BPM platform to manage the data and workflows within the firm and after a review of applications on the market, we selected FloSuite Legal.

"We chose FloSuite Legal as it provided a true rapid application development environment rather than just a workflow tool. Also, the MS Visio-based development environment was already familiar and suited to a business analyst."

**The Turcan Connell Client Matter Inception application, which closely integrates with Microsoft Office, Microsoft Exchange and Pilgrim LawSoft, automates and manages a range of procedures, including:**

- Collection of CRM information - which also includes enhancements in how this information is recorded
- Collection of client and matter information
- Money laundering procedures
- Data integrity - identifying if the client/contact already exists, introduction of mandatory fields
- Letter of engagement production
- A trust, charity and executry workflow
- Adherence to many sophisticated approval processes and business rules

**The solution has delivered significant improvements in knowledge management capabilities and 'smarter working' procedures, providing the firm with:**

- Standardised business rules and risk management

- Enhanced contact and client relationship knowledge
- A reduction in administrative effort for Client/Matter Inception processes
- The ability to convert a contact to client through rules-driven procedures
- The ability to edit existing clients and matters using rules-driven procedures
- Automated document generation
- Increased levels of operational efficiency

The application integrates primarily with the firm's Practice Management Solution Pilgrim LawSoft, Microsoft Outlook and Microsoft Word. Further integration with the firm's taxation and fund management systems is planned as part of a second phase project.

Turcan Connell's longer term vision is to fully exploit FloSuite Legal's capabilities to further improve profitability, enhance an already unrivalled level of service to their clients and strengthen their position as a leading adopter of innovative technology.

---

#### SUMMARY:

FloSuite Legal and Turcan Connell worked closely to deploy - in just 12 weeks - a new Client Matter Inception application using FloSuite Legal BPM, which has delivered significant benefits to the business, improving knowledge management capabilities, increasing operational efficiency and enabling 'smarter working'.