legalworkflow

DATA SHEET

Custom Workflow for Practice and Case Management Systems

Workflows streamline work practices enabling legal practitioners to spend more time with their clients, and less time on repetitive and manual tasks. Inevitably traditional legal software suppliers' out of the box workflows (where they exist) do not provide the solutions that individual law firms want in the way that they want.

Legal Workflow's position on customised workflows is to utilise a client's existing technology wherever possible, so as to extract maximum value from investment already made, but where this does not meet their needs, we plug the gap with applications we write ourselves.

Some of the workflows we have developed and continue to evolve:

- Residential Conveyancing
- Probate
- Civil Litigation
- Personal Injury
- Family
- Debt Recovery
- Crime
- Employment
- Wills
- LPAs
- Declarations of Trust
- Commercial Property

Generally speaking, the benefits of a customised workflow include:

- A reduction in the degree of risk the firm is exposed to
- The simplification of processes such as introducing clients to other departments or teams for cross-selling purposes
- An improvement in budget management, bill payment and cash flow forecasts
- Ensuring appropriate and correct information is included within client-facing documents and emails
- Reducing the possibility of missing key dates or actions
- Being alerted in a timely fashion when approaching budgeted time limits
- Ease of locating relevant information at any time.

Typically, features of a Legal Workflow customised workflow include:

- Single entry of information is shared across systems, applications and teams
- Policy, protocol and brand conformity and ability to demonstrate compliance
- Automatic alerts of key opportunities, deadlines and when approaching budget limits
- Easy and secure access to data via your existing document management system.

Compliance

Compliance can be enforced and demonstrated, including against a firm's individual protocols, which reduces the degree of risk the firm is exposed to.

Cross Sell

Cross-selling opportunities are automatically identified and the appropriate documentation and referrals created, making it a simple process to introduce others in the firm into the case.

Single entry

Financial information entered into the case is automatically fed to the firm's ledgers, facilitating improved budget management, bill payment and cash flow forecasts.

Policy Management

Policy management is improved with the automatic creation of a personalised email with relevant information and documents, such as acknowledgements and Terms and Conditions, attached.

Action Alerts

Next steps get flagged for action by the lawyer reducing the possibility of missing key dates or actions

Time Management

Time budgeted for and spent on a case is automatically monitored and alerts enable the case manager to see when approaching those limits, allowing them to take action in a timely fashion.

Document Management System

All of the documentation is saved to the firm's own document management system making it simple to find relevant information at any time.

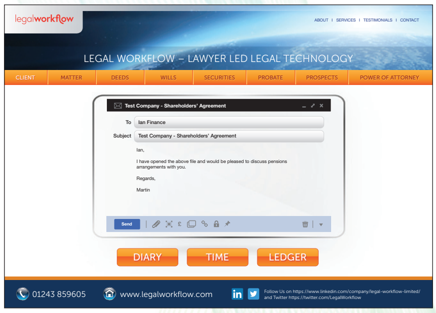
Example:

Let's take the example of a commercial transaction where client instructions have been taken and the lawyer wants to produce a compliant Client Care letter.

In order to process this, an immediate check is made as part of the workflow as to whether the transaction is within the firm's professional indemnity insurance limit or whether it will be necessary to refer the matter to the insurers, by way of risk management.

The lawyer simply selects the transaction he wants to cover. In this example, it is the preparation of a Shareholders Agreement, and this triggers a couple of cross selling opportunities which are enforced by the workflow. In this example, an email is automatically generated to send to the firm's financial adviser to discuss pension arrangements and the lawyer is asked to consider whether to refer to the firm's private client department if Wills or LPAs are needed.

In each case an email is produced for the relevant department with the appropriate information included.



Information is entered regarding charges for the client - budget is proposed for profit costs; consider any third-party charges that might arise; estimates disbursements entered; compliance with the firm's billing policy enforced; deposit required; time estimate entered and lawyer asked to consider cost/benefit analysis set out in a protocol.

From these few clicks a fully compliant Client Care letter is produced – the client's address is automatically pulled in from the database, reference and fee details are included, as are instructions from the client, charging rates, budgeted fees discussed, disbursements that are expected to be incurred, reference is made to the firm's Terms and Conditions and billing policy, service levels are noted, next steps to be undertaken and details about ID required.

All of the things that ensure compliance with the firm's protocols are guaranteed by the custom workflow.

Integrated time posting for the letter automatically goes onto the ledger, an acknowledgement form is produced so the client doesn't have to return the entire Client Care letter, and an email is automatically generated to attach to the client letter together with all of the documents necessary to send to the client.

Throughout the process, helpful messages appear to let the lawyer know what's required at this step. A budget limit is entered so that when time/disbursements take the lawyer near to that budget limit an alert will appear.

Custom built cost forecasting in the workflow enables cashflow forecasting for the entire business, with every lawyer's view of their own cases aggregated across the firm.

Next steps are flagged up for the lawyer too – in this case identity confirmation – and all documents are saved automatically to the specific case on the firm's document management system.

Other Products from Legal Workflow

- Client self-service products
- Software integrations
- Expert systems
- Artificial Intelligence
- Word custom ribbons

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- Business analysis
- Process engineering
- Consultative advice
- Customisation of Workflows
- Helpdesk support
- Practice management selection
- Change management
- Implementation projects
- Training
- Retainer services

About Legal Workflow

Legal Workflow is a pioneering, lawyer-led, legal IT consultancy. We are creators of innovative products, services and integrations that drive increased productivity, improved profitability, smarter service provision, superior user experience and all the rewards of a modern, high-tech legal firm.

Through the imaginative application of technology, allied with commercial acumen, we customise practice and case management systems, adding our own products, including online legal services and AI capability, to create modern, streamlined and cost-efficient systems which are a joy to use.

LEGAL WORKFLOW – A PIONEERING, LAWYER-LED, IT CONSULTANCY

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