

# CASE STUDY

## How Legal Workflow helped an established, independent, UK law firm with five offices in southern England, achieve ISO9001 accreditation in the fastest time

### Situation

The law firm in question wanted to join an organisation offering independent law firms in the UK and Ireland access to collective purchasing, shared knowledge & best practice.



However, every member must secure and maintain ISO9001 quality assurance standard - which includes regular independent evaluation, providing in-depth analysis of their performance and recommendations for continuous improvement to ensure customers receive the best possible service.

To achieve this quality assurance standard necessitates reviewing, documenting and auditing their processes within the firm to ensure that clients receive consistent, good quality products and services.

### ISO9001 Process

The standard combines the process approach with risk-based thinking, and employing a “Plan-Do-Check-Act” cycle at all levels in the firm.

Martin Langan, MD of Legal Workflow comments: “For law firms, the aims of ISO9001 very much mirror those of our case and practice management workflows. Our workflows aim to support single entry of important information thus reducing the propensity for error, to enforce organisational conformity and compliance thus minimising risk, to create alerts for key instances thus eliminating missed opportunities, and to keep documentation safely stored and easily accessible via their own document management systems.

“When our client approached us to build workflows to help them achieve ISO9001 we were delighted also to support them throughout the documentation and audit processes.

“Once documentation is completed the ISO audit usually takes around 5 days to complete.

In our client’s case, and with workflows in place, there was very little documentation required.

“The auditors arrived and by lunchtime on Day 1, when they reviewed and carried out file samples, they could see everything was performing correctly.

“Half way through Day 3 the audit was complete and they had found not even one minor error, which they said incredulously was “as rare as hens’ teeth!”.





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## Result

The firm now has robust custom workflows which streamline work practices enabling legal practitioners to spend more time with their clients, and less time on repetitive and manual tasks. Specifically, they have:

- Enforced compliance with their firm's protocols, reducing the degree of risk the firm is exposed to
- Simplified the management of cross-selling opportunities across the firm's offices and departments
- Improved budget management, bill payment and cash flow forecasts across the firm by sharing financial information across their systems
- Facilitated policy management improvements with the automatic creation of relevant and personalised communications and documentation
- Reduced the propensity for missed key dates with next-step-flagging for action by their lawyers
- Enabled more timely action to be taken by alerting the case manager to approaching limits on budgets and costs
- Standardised saving and retrieval of all documentation related to a case by using the firm's own document management system
- Certification of ISO9001 with the audit being completed in record time – two and a half days rather than the standard five days – and with zero errors
- Achieved their objective of joining the organisation.



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