



PracticeEvolve Case Study

Leanne Warren & Associates

Transforming Staff Satisfaction and Efficiency: How Leanne Warren & Associates Leveraged EvolveGo's Connected Software

Leanne Warren & Associates is a renowned criminal defence firm based in Melbourne, Victoria, with a solid track record of providing expert representation to vulnerable clients with mental health issues and representing a broad range of offences.

The firm faced productivity challenges caused by unpopular software and siloed work practices. Teams lacked engagement with the software and worked in disparate ways, leading to reduced productivity and lower staff morale.

To address their software integration issues, the firm began a process of investigating different software solutions available within the market. However, the Practice Manager, Tracey Gulli, adopted a cautious approach, mindful of the potential risks associated with rapid change.

Tracey took charge of the search for a new solution, actively exploring the market to find a system that would enhance the firm's client service. After carefully considering different options, Leanne Warren & Associates made the decision to transition to EvolveGo from PracticeEvolve, aiming to address their challenges and enhance their overall operational efficiency.

Overcoming Fear of Change

Making the decision to switch to a new practice management system can be an intimidating prospect, particularly for a firm that has been using the same solution for an extended period. As a software provider, PracticeEvolve recognises the importance of understanding clients' needs, working collaboratively to address their fears, and providing a reliable product and process to ensure a seamless transition.

Tracey Gulli | Practice Manager at Leanne Warren & Associates

Tracey Gulli is the Practice Manager at Leanne Warren & Associates, bringing extensive accounting experience and a background in the legal industry.

With prior work as a Business Analyst for a leading legal practice management software company, Tracey is proactive in adopting technology to deliver the highest level of service to clients.

As the primary contact for new clients, she leverages her expertise in Criminal Law to provide compassionate and efficient case flow management in the client-solicitor relationship.



Leanne Warren & Associates underwent a 12-month process to transition to a new practice management system. To feel comfortable with the decision, the staff needed reassurance and support throughout the process, especially after experiencing a lack of support from a previous provider.

The firm recognised the need to prioritise staff satisfaction and embarked on a selection process based on several key factors. These factors included the requirement for a comprehensive suite of functions, a user-friendly experience, seamless integration with other software, and the ability for users to confidently navigate the features and functions.

The decision to switch to EvolveGo was based on its comprehensive functionality, which was identified during a thorough evaluation of various options. A tailored demonstration, in close collaboration with the Leanne Warren & Associates team, was crucial in showing how the system could improve their work lives. Providing high-level support during the decision-making process reassured the staff that they were making the right choice and boosted their confidence in adapting to new technology.

"When we chose to switch to EvolveGo, it wasn't just about the impressive functionality. PracticeEvolve took the time to truly understand our unique challenges and needs, providing tailored demonstrations to showcase how EvolveGo would enhance our daily processes and improve our work lives. Despite other options in the market, the combination of outstanding features and a personalised approach made EvolveGo the obvious choice. The sales team's effective communication of the product's benefits and how it addressed our pain points was critical in our decision-making process, emphasising the importance of demonstrating how a product can make a real difference for clients."

*Tracey Gulli, Practice Manager
at Leanne Warren & Associates*

Transitioning to EvolveGo swiftly dispelled Tracey and the Leanne Warren team's initial doubts about changing systems, as they recognised the numerous benefits it offered. The flawless implementation process further solidified their confidence in the decision to make the switch. Looking ahead, Tracey is entirely confident in their choice, as the positive outcome has generated enthusiasm among the firm's staff, who wholeheartedly embrace the capabilities and benefits of EvolveGo.

Streamlining Operations: How Leanne Warren & Associates Optimise EvolveGo's Key Features for Seamless Efficiency

Leanne Warren & Associates has embraced the core features of EvolveGo to enhance the way the team operates, empowering them to streamline processes, improve client service, and boost overall efficiency. With EvolveGo, Leanne Warren & Associates has taken a significant step towards optimising their performance and achieving greater success.

Effortlessly Manage Matters with the Digital Matter Card

Leanne Warren experienced a significant improvement in organisation and efficiency through EvolveGo's digital matter card. This feature consolidated all crucial case information, including court dates, charges, and court listing numbers, into a single, easily accessible place. The team can quickly access and manage case details, instilling confidence in their clients and enhancing their ability to provide exceptional service.

"The convenience of having everything consolidated on the matter card is a game-changer. Going paperless during Covid made us realise the inefficiencies of managing both physical and electronic files. With EvolveGo, it is a one-stop shop where we can see everything related to a matter. It is a significant improvement for our firm."

Secure Communication and great client experience

The Communicate feature of EvolveGo has transformed the way Leanne Warren's team communicates with their clients. With this tool, they can securely send messages, reminders, and updates to clients without the need to worry about security issues. This convenient feature has made communication much more efficient, resulting in better client satisfaction and increased productivity.

"The Communicate App has made a notable change in the way we communicate with clients regarding court-related matters. As many of our clients require reminders about their court appearances, this feature has proven to be invaluable. Having the contact information readily available on the matter card has made it easy to send them text messages without the need to search for phone numbers or worry about missed calls. We have found this feature to be a big asset that has simplified our client communication process."

Simplifying Legal Aid Work with Bill Set Rates

EvolveGo has simplified the legal aid work for Leanne Warren's team. With bill set rates and task codes, they can easily handle legal aid matters and ensure accurate fees are charged for each case. This streamlined approach allows for quick

adjustments to fees, making billing a breeze. The team is confident in their billing, and clients appreciate the clarity and transparency provided by this feature.

"We have successfully addressed the complexities of legal aid support and invoicing by implementing bill set rates within the system to align with the table format used by legal aid. Each file is associated with specific bill set rates and task codes, ensuring accuracy and efficiency. Furthermore, updating the rates annually has become a hassle-free process, allowing us to easily adjust to legal aid's fee increases."

Streamlining Billing Workflows with an Intuitive Interface

The implementation of EvolveGo has dramatically changed the office's billing process by introducing fundamental changes. Embracing time recording for all activities, including fixed work items, and leveraging the system's intuitive interface, the billing team now experiences a seamless workflow, ensuring efficiency and ease throughout the billing process. The customised dashboards have also been helpful in managing billing and budgeting, keeping the team on track, and effectively managing the firm. With EvolveGo, the team can manage their finances with ease, allowing them to focus on their clients.

"Following our transition to EvolveGo, I proactively implemented time recording for all activities, including fixed work items, a functionality lacking in our previous system. The accounting functionality in EvolveGo is exceptionally intuitive and user-friendly. Our team appreciates the seamless process of adding work items, initiating billing, obtaining approval, and finalising the entire procedure. EvolveGo has successfully streamlined our billing workflow, making it easier and more efficient."

Transforming Training with the EvolveCommunity Platform

The EvolveCommunity platform has played a pivotal role in the training of Leanne Warren's team, offering them a valuable resource for enhancing their system proficiency. The platform's on-demand training sessions have transformed their learning experience by providing easy access to specific information without the need to rewatch entire recordings. This efficient and effective training approach has significantly contributed to the team's growth and competency in utilising their new practice management system.

"I found the EvolveCommunity platform helpful, especially for staff training. It is especially useful to be able to jump on the recorded training sessions and fast forward to the parts I missed or wanted to review, which saved me time. The community platform allowed me to quickly find the information I needed and get back to work."

Trust, Satisfaction, and Advocacy

The implementation of EvolveGo at Leanne Warren & Associates has proven successful, yielding numerous benefits for the firm. The transition to the new platform was seamless, resulting in increased staff satisfaction and a notable enhancement in client service. The team fully embraced EvolveGo, praising its user-friendly interface and acknowledging its pivotal role in boosting productivity.

The positive experience with EvolveGo extends beyond the software itself. Leanne Warren & Associates were impressed by the exceptional service approach accompanying the implementation, which included seamless coordination and attentive guidance. This level of support established trust in the software and its accompanying services. As a result, they have become enthusiastic advocates of EvolveGo, readily recommending it to others.

"Our experience with EvolveGo has been truly fantastic. Every single staff member has wholeheartedly embraced the change with genuine enthusiasm and without a single complaint. The level of satisfaction among the team is evident, reflecting the remarkable impact and value that EvolveGo has brought to our operations. The transformation we have undergone with EvolveGo has been fabulous."

*Tracey Gulli, Practice Manager
at Leanne Warren & Associates*

This successful transition stands as a testament to the power of collaboration with a proven partner. By overcoming initial fears and challenges, Leanne Warren & Associates have unlocked a new level of success and efficiency in their legal practice management. They eagerly anticipate the future with EvolveGo, confident in its ability to continuously propel their firm forward.

Get in Touch

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