

&LEGAL CASE STUDY

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INNOVATIVE LAW FIRM SEEKS FLEXIBLE TECHNOLOGY PLATFORM

&Legal is an innovative law firm that has evolved from the firm's origins in the 1970's. Specialising in property and litigation services, their expertise and commitment to their clients has won them awards including NAB's 2018 Professional Services Awards for Wills & Estates work.

The firm had a practice management system for nearly fifteen years and, in recent years as the business grew, it started to feel the limitations of their technology.

Their previous system provided limited access to the data that it contained and couldn't be configured to meet their specific working methods.

KEY TECHNOLOGIES

&Legal work more efficiently with:



POWERFUL AND PRACTICAL REPORTING TOOLS



BUSINESS INNOVATION THROUGH RESTFUL API INTEGRATION



INTUITIVE WORKFLOW FUNCTIONALITY

&Legal made the decision to revolutionise their operations by looking for a new solution that would fit more closely with their changing needs.

UNRESTRICTED ACCESS TO DATA

Key to &Legal's decision was a solution that had the capability to support their efficient work practices and give the firm full access to their data.

Having spent considerable time investigating several systems available to them, &Legal realised that not all vendors held the same philosophy of openness of data access as the firm.

Ultimately, PracticeEvolve was the only technology provider offering the flexibility and functionality that the firm sought from their new practice management solution. They liked that the system offered a single platform which combined legal accounting functionality and the suite of practice management tools to support their legal teams.

Critically, it was PracticeEvolve's attitude towards supporting and simplifying access to the data in their solution that sealed the deal.



DARIAN IACONO
Solicitor Director,
&Legal

Darian Iacono, Solicitor Director of &Legal, explained the reason why in the end PracticeEvolve was the only choice for his firm. *“We spent quite some time looking for a system that offered both, the functionality to automate our business workflows, and the flexibility to manipulate our data as we see fit. Unlike some other providers, PracticeEvolve gives us complete control over our data and the tools necessary to manipulate it.*

The reporting functionality is intuitive and easy to learn and use. As a firm, we dictate the data we want to capture, and the system allows us to build customisable reports in-house and in real time without requiring specialist skills or incurring any extra fees. This is vital for a larger firm, especially one that is on a steady path of growth.”

DESIGNED FOR FLEXIBILITY

PracticeEvolve’s extensive capabilities to customise and adjust to the bespoke requirements of &Legal meant that the firm could integrate the system into their core business with relative ease.

After going live with PracticeEvolve in April 2019, &Legal has been working to design and implement the document automation and operational processes that will make up their legal workflows moving forward. The firm’s strategic vision is centred around continual improvement, with PracticeEvolve’s technology being a key part of this.

“We’re looking to PracticeEvolve to help us deliver greater efficiencies through precedent automation and streamlined workflows. Moving low value-add work to an automated solution will enable us to deliver more with less which in turn will better showcase our value proposition to our clients”, said Mr. Iacono.

PUTTING CUSTOMER VALUE FIRST

Although any number of factors may trigger a firm’s decision to modernise their technology, one explicit goal is paramount: to deliver value. Every investment in technology should amplify the benefits for end customers, whether through better experiences, higher service quality, or operating efficiencies.

One of the driving forces behind Mr. Iacono’s decision to partner with PracticeEvolve, was the software providers’ upcoming RESTful API functionality.

Contrary to many other legal practice management providers, this modern and open approach provides firms with the ability to select and combine services from a range of best-in-class providers, within an overall framework that suits the firm’s unique needs.

“What appealed to me was the system’s potential to be flexible and accommodate a range of possibilities for connection and configuration for our business in the future. Their open approach and drive for innovation aligns with our fundamental values and fits our plans for growth. I like knowing that my firm is supported by a system where the client is put first,” stated Mr. Iacono.

KEY LEARNINGS FROM THE JOURNEY

-  When looking at technology, ask yourself *“How will it save us time or give our clients improved service?”* This can provide a useful framework to distinguish between tools that are genuinely going to add value from those that could distract the business from its goals.
-  Allow sufficient time to plan for a big transition such as changing practice management systems and consider where the stumbling blocks may be. This will simplify the transition process when the project starts to get underway.
-  Find an internal champion to take ownership of the day-to-day aspects of driving the project and have them report to the business owners. Having owner-level buy-in is fundamental to the overall purpose and success of the project.