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## CASE STUDY

### **Practice Makes Perfect**

Founded in 1788 by Jesse Gregson, Gregsons has kept pace with the times to become a thriving modern law firm. It has a wide spread of expertise to meet client's legal needs in family and business matters. Gregsons has one Managing Partner, four partners and around 39 staff. It has seven departments consisting of family, criminal, employment, residential conveyancing, company / commercial, probate and civil. Gregsons has grown consistently due to demand, despite a number of large competitors. Because of its age, history and family character, it occupies a solid niche in the market, still boasting family connections with its founder.

### **Background**

Gregsons employed an IT Manager, Roger Lucas, in June 2000 following demand from members of staff for a more efficient and reliable computer system. They also wanted to reduce the time lost through computer down-time.

The decision was made immediately to split the accounts and IT roles, something previously handled by a single person. Though the firm had a domain name, mentioned on the brochure, they had no web site. This was a concern for partners, who were conscious that the Web was often the first point of contact for new clients. As requests from clients began to grow, the first task was to establish Gregsons online.

### **The needs of the practice**

All legal firms have slightly different needs. Any new IT system must address both the present and future requirements of the practice, as well as those of the individual staff. True to their policy of involving everyone in the decision making process, Gregsons set up a number of project teams to assess the impact of new technology on the firm.

Whilst its IT function was based on a Microsoft platform, Gregsons recognised the need for a more efficient and tailor-made package. This would service the administrative functions of the firm, as well as the seven legal service departments. It would enable the practice to provide a consistent and accurate service to the client and help to increase profits by improving productivity. It also needed to suit the skills of staff members, who varied in age, experience and computer literacy. With a functional system already in place, they required a system that could be built and added in stages in order to stagger adoption and training.

### **Meeting the needs**

After looking at a wide range of practice management software, Gregsons chose the Partner for Windows

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product from Technology for Business (TFB) because of its advanced functionality and comprehensive range of features. Partner for Windows is based on step-by-step implementation and training programmes that suited the capabilities of the Gregson's staff and time constraints that limited training time. It met the firm's immediate needs and didn't contain irrelevant options that took-up additional computer storage space and slowed down the system. "We did look at other companies, but went for TFB because it's a system you can build in stages, not just one whole package," Roger Lucas, IT Manager, Gregsons.

One of Gregsons main concerns was the training that the system required. The system offered by TFB consisted of different stages of training, so that staff were not bombarded, in one go, with very complicated technical information. The system was first implemented in the accounts department where need was greatest, and was then migrated through the other areas of the firm.

As Roger Lucas points out, "TFB was the only product we found that could be built to specification with all the various components relevant to Gregsons." The compatibility with existing Windows applications was another key attraction of the system and meant that familiarity and ease-of-use were strong selling points to users. Some of the alternative products proved rather complicated and less user-friendly. TFB's Partner for Windows system was seen as a far friendlier system because of its Windows based environment. TFB was closely involved with the implementation at a consultancy level, providing their expertise and experience in dealing with other practices. They planted the ideas with Gregsons and provided support throughout the development process.

### **Two-fold benefits**

The benefits of the new system are two-fold. On the business side, it has enabled a stage-by-stage sequence of upgrades that can be added to and tailored to the demands of the future. It has cut the time spent in training and, therefore, kept interruption to a minimum and productivity levels high.

Gregsons recognised that a new IT system was inevitable and, despite concern over cost issues and change over time, the staff were able to master each stage effortlessly. "The people here are adaptable and switched on but they are busy and this system is easy to train people on," as Roger Lucas explains.

In addition, the implementation of upgrades became a smooth process. By the time the second round of training courses took place, the staff had mastered the first stage of the system. There have been very few complaints from the Gregsons staff and only surprise at the ease in which documents can be accessed, shared and retrieved.

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The improvement in client service is one of the key advantages achieved through the system. Clients saw an immediate and dramatic change to the service they received, with an improvement in response time and information delivery. On ringing in to Gregsons with a query, they are provided with immediate answers and their solicitor can bring up a document immediately onto the screen.

Documents do not have to be retrieved from storage every time there is a query as the full history of a case is immediately available electronically. Both the quickened response time and improved availability of information have helped to change the traditional image of the law firm. "This is a major breakthrough in client relations. Clients still think of a solicitors firm as operating behind closed doors, solicitors have to try and get away from this dark image, a bright website is the first stage," comments Office Manager, Breda Webb.

### **No excuses**

Like many other firms of its size, Gregsons has a large number of IT literate young people amongst its staff. There is no reason why it cannot have the usual levels of technology found across the service sector. "People are often surprised at the level of technology we have, we've got Intranet, email, web site and we fax from our PCs". Despite this, in an area such as The City, a lot of the more traditional firms are falling behind their counterparts because of their resistance to change. Factors such as time, lack of understanding and fear are all commonly cited. Though, as Gregsons has found, the key to a successful computer system is the way that an IT system is implemented. This means, not trying to put everything in place at once and trying to get it up and running within a month.

### **Industry led**

With the Government demanding more legal audits, a more automated system, such as TFB's Partner for Windows, can take care of the donkey work, saving precious time with its Legal Aid reporting facilities.

### **The ecommerce path**

The future holds a great deal of change for the traditional law firm. The adoption of ecommerce is going to be a slow process, but partners are aware that the legal sector will have to go down this route, carrying out more web-based work. "For Gregsons, this means an overhaul of the current web site to include more information and an introduction to each department with links to the relevant staff member. The use of email is also being encouraged, especially as a means of contacting overseas clients. As more and more people these days are aware of their rights, the demand for solicitors is due to rise and potential clients will head for the Internet to look for a solicitor". As Roger Lucas explains, "an online legal service is soon going to be a requirement for many firms. I think its going to have to happen because the demand is there and if you don't address this successfully,

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you will be left out in the cold".

### **About Gregsons**

Founded in 1788 by Jesse Gregson, Gregsons has kept pace with the times to become a thriving and modern law firm, with an unusually wide spread of expertise that will meet client's legal needs in family and business matters. It has a wide spread of expertise to meet client's legal needs in family and business matters and applies professional and technical competence in its approach to the business of law.