

### Kimbell's LLP use Marketing Partner to streamline the management of and enhance their ability to produce sophisticated marketing campaigns all from within their Partner for Windows database.

Since the firm was established in 1986, Kimbell's has seen the legal services it offers to its clients extend across a diverse variety of fields within the commercial sector including Corporate, IT, IP, Employment and Commercial Property to name but a few. With such a variety of disciplines the practice had to ensure it remained clearly focused on its clients' needs whilst consistently adhering to the ever changing legal climate.

As a forward thinking, modern practice Kimbell's were not afraid to embrace the advantages that technology could bring to the firm, its associates, staff and clients alike. Furthermore, when it came to selecting their system, they knew that to remain at the forefront of their profession they had to look beyond a simple IT package 'solution', but rather acquire an organic practice management system which would not only compliment their requirements but also grow with them. Key to this was marketing, a facility which Kimbell's had recognised no modern firm could afford to ignore.

#### THE CHALLENGE

Kimbell's had some clearly defined requirements in relation to the marketing function when it came to selecting a suitable practice management system. On reviewing the solutions available, it quickly became obvious that there were no appropriate off-the-shelf packages on the market which would fulfil all of the firm's marketing needs. Most of the systems available responded to the needs of high street practices wishing to communicate with private individuals. They failed to cater for a more sophisticated approach, where clients were large corporates with multiple contacts, all having defined responsibilities in relation to buying legal services. Kimbell's needed the ability to target specific communications related to different areas of the law towards selected individuals in any one organisation. There was also a requirement to monitor communications, whether to assist with event management or to gauge feedback to particular articles. Furthermore the marketing team needed to be able to record background research on prospective clients, track contact and record notes on activity with particular individuals or companies. All of this needed to be able to draw on the information already held within Partner for Windows.

#### THE SOLUTION

The key advantage, therefore, that TikitTFB was able to offer over other suppliers was their willingness to work closely with Kimbell's, developing a marketing function which would meet the needs of a commercial practice and thus deliver value added features. Together Kimbell's and TikitTFB set about customising and tailoring the software to meet these specific needs. Partner for Windows has proved to be user friendly, which means members of the firm are happy to use it to maintain accurate contact records, to monitor activity and manage communications.

#### THE BENEFITS

Migrating all contact details for clients, prospective clients, suppliers, other professionals etc., to a central database used by the whole practice has taken

#### FIRM SPECIALISM

**Commercial**

#### LOCATION

**Milton Keynes**

#### PARTNERS

**8**

#### SOLUTION DEPLOYED

**Partner for Windows  
Marketing Partner**

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## A PARTNER FOR WINDOWS CASE STUDY

time and involved changes in working practice. Nevertheless, the benefits are now having a positive impact on all users, with recognition of the usefulness of having 'at a glance' access to information about their clients and contacts, marketing communications – as well as matters details and accounts information.

Alison Foxton, Marketing Manager at Kimbells comments: ***“From a position five years ago when we were faced with having to try and make do with marketing solutions which really did not fit our needs, we have progressed to what is, to all intents and purposes, a system customised to our specific requirements. Partner for Windows now enables us to carry out sophisticated marketing activities which adds value to both our system and our services.”***

The practice now uses Partner for Windows for a number of marketing related purposes. The value of a central database for the whole firm cannot be underestimated – the aim is for it to become an indispensable part of working life, which means that everyone has a stake in keeping it up-to-date.

All of Kimbells' marketing campaigns are run through Partner for Windows, with generation of mailing lists being achieved literally at the touch of a few buttons, based on the sophisticated search facility, with an automatic mail merge, often of hundreds of documents. This speeds up what was a manual process enormously, with the option for intervention if mailing lists need to be customised prior to the merge.

The firm is highly committed to its client care programme, and case manager is used to implement this. A client care matter is opened for every client and time relating to service delivery tasks can be recorded against this for management and reporting purposes. A client care agenda ensures that the necessary steps such as money laundering checks are undertaken on first being engaged by a client, with relevant documentation being automatically generated and filed for future reference.

Another use the firm has made of Partner for Windows is for contact management. A system has been implemented, again using features in case management, to ensure regular contact is maintained with clients or prospects, appointments consistently diarised and the notes system used to record contact or any future activity required.

Kimbells' Systems Manager, Stuart Taylor, concludes: ***“Our reason for choosing Partner for Windows as our practice management system was largely down to flexibility. Both the flexibility of TikitTFB in responding to our requests to customise areas such as the marketing module to our specific needs, and the flexibility of the back end of the Partner for Windows database.”***

## ABOUT TIKITTFB

With more than 30 years of dedication to the legal profession, TikitTFB supports over 600 legal practices throughout the UK with managing risk, ensuring compliance and enhancing profitability using our award-winning Partner for Windows Practice and Case Management system.

Partner for Windows uses industry standard Microsoft technology, enabling the software to be smoothly integrated into existing infrastructures. Catering for firms of all shapes and sizes, Partner for Windows provides a flexible and comprehensive solution which can be readily tailored to meet the needs of practices now and in the future.

Part of the Tikit Group, provider of IT services and software to 90% of the UK's top 100 law firms, TikitTFB is well positioned to make magic circle technology accessible and affordable to large regional and high street firms.

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