

# Scottish firm Masson & Glennie improve system performance and user efficiency with the TikitTFB Training Passport Service

## THE CUSTOMER

Masson & Glennie is a law firm based in the North East of Scotland, who have been supplying a range of professional legal services including Property Purchases and Sales, Wills, Trusts and Executries, Family Law, Commercial Law and Investment and Insurance for over 80 years.

The firm has offices in the fishing ports of Peterhead and Fraserburgh and serves the local community around the two ports. They are committed to a well-established client base built up over the years by the provision of caring and professional legal services tailored to the specific needs of their clients.

The firm have been a client of TikitTFB since 2003 when they first implemented Partner for Windows and have since further enhanced their system with the addition of PartnerMail (email management), Postroom Partner (document scanning and allocation) and Partner TaskCentre (business process automation). Most recently the firm has implemented a TikitTFB Training Passport, which is a package of system service and consultancy days supplied by TikitTFB.

## THE CHALLENGE

Masson & Glennie had historically managed the development of their Partner for Windows system and other IT applications in-house despite having no formal IT department or IT trained personnel. One member of staff within the firm was charged with managing the updates to the software and developing the case flows but Marjorie Sutherland, Managing Partner at the firm, knew they weren't getting the most out of the system. *'We knew there was so much more potential within Partner for Windows, but we just didn't have the expertise or the time to dedicate to moving the system on so we approached TikitTFB to see how we could address the situation'*

## THE SOLUTION

TikitTFB put forward the Training Passport service, a package of service days which the firm could utilise to maintain and further develop Partner for Windows. Marjorie costed out employing someone from TikitTFB for two days a month allowing those who had been managing the system to be deployed back into fee earning and supportive roles. Compared to employing a full-time IT person, it would save the firm thousands of pounds a year as well as providing an experienced and trained consultant to manage their system requirements.

Within three months, Masson & Glennie had the service implemented and have been experiencing the benefits ever since. A dedicated trainer and consultant at TikitTFB, provides two consecutive days each month and prior to each visit, Marjorie plans the areas to be worked on whilst they are there. The schedule of work is discussed on the first morning so that both party's expectations of what will happen over the two days can be managed effectively.

The Training Passport is a full service solution and the TikitTFB consultant deals with everything from case management development, the writing of TaskCentre

## FIRM SPECIALISM

Legal, Estate Agency and Financial Services

## LOCATION

Peterhead and Fraserburgh

## PARTNERS

4

## SOLUTION DEPLOYED

TikitTFB Training Passport



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## A PARTNER FOR WINDOWS CASE STUDY

alerts and Crystal Reports, to Partner for Windows consultancy including case management and credit control, Excel Management reports writing and support relating to MS Office issues.

Marjorie comments, *'The service has been excellent and we definitely get maximum benefit from the two days. Our TikitTFB consultant is first class - he is easy to work with, nothing is ever a problem and he will even look into any support issues if they arise. He is an invaluable member of our team and I'm not sure what we would do without him now!'*

### THE BENEFITS

Masson & Glennie have had the Training Passport for a year now and have renewed for a further 12 months. Over that period the firm has seen a huge improvement in the performance of Partner for Windows; the system operates faster and the development of additional caseflows, alerts and reports has helped the firm better manage their case load and the overall management of the business.

'The Training Passport service has saved a phenomenal amount of time and money. As part of the service we had a management report procedure developed for the cash room which removed a lot of the detailed work that used to go in to compiling it and now means that time can be focused on other areas of financial management.

*'In general the practice is more efficient and a lot more profitable; the developments to Partner for Windows and the services supplied as part of the Training Passport mean that we don't need to employ extra staff to help with administration because the system manages everything so efficiently.'*

### 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.

### CONTACT

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