PracticeEvolve™

Ellis Jones Solicitors:
Case Study

Recognising how disperate systems were driving inefficiencies, and manual processes impacted productivity, Ellis Jones chose to partner with PracticeEvolve to deliver modern software and a service to empower users within the firm to maximise the software.

STREAMLINING PROCESSES

Ellis Jones are a leading independent law firm based in the South of England. With over 180 users across 6 offices around Bournemouth and London, the firm provide a full range of legal services. Having been with their previous software provider for many years, Ellis Jones wanted to further streamline their processes, whilst assisting administration. Their need for a solution to offer ease of use, while improving connectivity between users and software led them to the PracticeEvolve suite.

BRIDGING THE GAP BETWEEN SOFTWARE SOLUTIONS

Leading up to 2020, the firm recognised their disparate systems were leading to time-consuming manual processes which were inefficient and costly to the business. The firm identified the need to streamline processes and reduce administrative tasks in order to free up lawyer's time to be better spent servicing clients.

Nigel Smith, Managing Partner comments, "We required features that would support our efforts in streamlining our processes and assist with administration. In turn, this would afford our team more time to focus on what's important to us, namely providing an excellent service to our clients."

ELLIS JONES
SOLICITORS

Ellis Jones works in partnership with their providers and presented a number of clear objectives their chosen system would need to deliver:

- Consolidate multiple software and filing methods into one system

- Introduce efficiencies via automated workflows and task creation

- Deliver a solution to enable users to work from anywhere, any time

- The ability to integrate with software to reduce re-keying, and minimise human error

- Empower Ellis Jones to constantly evolve experience

- Minimise disruption throughout the implementation process

CREATING STRONG RELATIONSHIPS

Important to both Ellis Jones and PracticeEvolve was the need to work as a strategic partnership in order to quickly exploit modern technologies and innovation. Therefore, immediate collaboration and open communication was key in the approach.

Nigel Smith comments, "As a firm, we believe in building long term strong and strategic relationships with our suppliers and working in partnership with

them to our mutual benefit. PracticeEvolve share the same values as us and we are very much looking forward to developing our relationship with them, which we are sure will be a long, successful, and happy one."

In order to meet Ellis Jones' objectives, PracticeEvolve implemented a six-stage process:

1. Collaborate with individuals to capture key challenges and demonstrate solutions offered by the software.
2. Review and audit all necessary integrations.
3. Deliver a clear plan to ensure a seamless data migration with regular check-ins.
4. Support Ellis Jones implementation with regular, engaging communication training.
5. Be on hand to offer support upon go live.
6. Ongoing communication as part of our Client Success program.

A COMPREHENSIVE SOFTWARE SUITE

PracticeEvolve technology delivered against a number of specific requirements, including:

➢ **Email filing -** Automatic filing and suggested locations
➢ **Integration -** Integrating with key partners, including InfoTrack
➢ **Department visibility restrictions -** The ability to reduce effort in finding relevant data
➢ **Centralised matter archiving screens -** Allowing easier access across multiple locations
➢ **Client onboarding -** Processes to improve efficiencies with client onboarding

SOFTWARE WITH A SERVICE: ENSURING A SMOOTH TRANSITION

A key consideration for Ellis Jones was the ability to migrate existing data to PracticeEvolve with minimal disruption. A clear migration plan and process was implemented with trial migrations to ensure the final, live migration was implemented without issue.

The decision to have training both remotely and on-site allowed the firm to ensure all staff received standardised training but also benefited from hands on experience in preparation for go live day.

Nigel Smith comments "Having gone live, our team have adopted PracticeEvolve very quickly which is testament both to them and the product itself. As a result of hard work and meticulous preparation before going live, the migration went smoothly and we were impressed by the level of service, care taken, and support given by the PracticeEvolve team. Features in the product are going to help streamline our processes and assist with administration, giving our team more time to focus on what's important to us – providing an excellent service to our clients."

A FULL-SERVICE SOFTWARE FOR A FULL-SERVICE LAW FIRM

Ellis Jones were very specific in their functionality requirements, choosing PracticeEvolve based on the intuitive software capabilities, alongside their collaborative approach. In particular the firm were excited about:

➢ One centralised system, creating work efficiencies
➢ Providing lawyers with in-depth information for both matters and clients
➢ Connected software, to reduce manual effort and duplication
➢ Access to EvolveLearning within EvolveCommunity for training and new feature news

"The user training took place over two weeks at the end of June and was a combination of Webinar style remote sessions followed by a week of on-site practical training with groups of 20-30 people at a time. The go live week was being supported remotely for the wider business, with Accounts support, Projects and Migrations being on-site for 3 days to ensure a smooth transition. We are also starting to realise the benefits of the Client Success programme with training plans put in place to improve user competency."

Ellis Jones will be connected to their very own Client Success Consultant, who will work alongside them to ensure they continue to maximise their software and keep abreast of upcoming releases and opportunities.

For more information, please visit **www.practiceevolve.com**
Book a no-obligation demonstration at **info@practiceevolve.com**

PracticeEvolve™