

CASE STUDY

Lucas & Wyllys: Embracing technology to stay ahead of the curve



Lucas & Wyllys is a progressive law firm with a strong presence throughout East Anglia. Coupling 150 years of legal experience with a forward-thinking approach, they focus on investing in the best technology to provide effective and cost-efficient services for their clients. **Managing Partner, Amy Church**, shares how the firm undertook their transition to digital conveyancing and the benefits the firm has seen since.

Results at a glance

- Saved an average of 25 minutes per matter to open a file
- Reduced average onboarding times to two days, down from over a week
- 80% of clients are now onboarded digitally
- Faster, smoother mapping process with no more scanning required
- 20% reduction of requisitions, especially for name-based errors
- Technology that clients love to use

A digital revolution

Amy and the team at Lucas & Wyllys knew that something needed to change when they were reviewing their conveyancing processes and the technology that supports them. With a server in the office basement and no case management or cloud-based systems in their arsenal, the firm recognised their processes were out of alignment with client expectations and knew they needed to adapt. In 2019, the firm sought out a better solution – a digital revolution as Amy puts it. It was then when they switched to using InfoTrack, as well as integrating with LEAP as their CMS.

When discussing why the change was important Amy says, “A certain level of technology is expected by clients these days and we like to go above and beyond. We like to stay ahead of the curve, particularly when it comes to technology.”

In the three years since making the switch, remarkable changes have been seen. The firm now uses less paper, delivers quicker turnaround times and improved accuracy, and their clients now enjoy an exceptional client experience.



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Digital onboarding is a gamechanger

For the team at Lucas & Wyllys, setting the tone from the start is crucial. It's why one of their favourite services through InfoTrack is eCOS (electronic client onboarding solution). Taking the stress out of opening a file, the process now only takes the team 10 minutes instead of the former 30-45 minutes it once took.

Not only saving time for the firm, it's also saving time for their clients who aren't left waiting days for the packs to arrive in the post, then to have to sign and return them by post again.

Instead, everything is sent immediately through the secure online platform, clients complete the relevant information, including digital ID verification and Source of Funds checks, before returning it.

80% of the firm's client base is now onboarded digitally via eCOS, saving the firm on average a week for every transaction.

Amy shares how transformative eCOS has been for starting a transaction off on the right foot. Meeting technology expectations of clients and accessing tangible benefits has been one of the biggest impacts the firm has seen when adopting InfoTrack.

"Most clients complete the forms and checks within a couple of days but some complete them within an hour!"

"eCOS also ensures that we get all the information we need from the clients as they cannot sign off the forms until they are 100% complete. It reduces the need for us to ask for more information and reduces enquiries on sale matters," adds Amy.

The team are so impressed with eCOS that the solution is now also being used across their private client and family departments, particularly to complete identity checks.

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Transforming the process from end to end

When it comes to value, Lucas & Wyllys understand how vital the right technology partners can be. Maximising the use of sophisticated data sharing via the integration between InfoTrack and LEAP, the firm continues to be an early adopter of new and enhanced services, as they become available. New services, such as Property Report, have reshaped how Lucas & Wyllys provide homebuyers with everything they need to know about the property they are purchasing.

“We have been using Property Report since August 2021. It took us a little while to get used to, but we would not be without it now. The layout of the solution and the report itself are user-friendly. We love that we can personalise the report and include our own colours, front cover, and leaflets. It’s helping us save up to one hour per matter too,” shares Amy.

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It’s time saved in the information that pulls through to the report, having pre-set answers to select – we save time as the report and attachments are one document, rather than having lots to print and sort individually.

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With the move to mandatory digital AP1s, InfoTrack’s digital AP1 submission tool and dashboard has been instrumental in ensuring continuation of service during the switch. The firm are seeing up to 20% fewer requisitions, especially those related to errors with misspelled names, and the team find the expiring priority reminders valuable to ensure nothing is missed.

To help bring everything together, the way InfoTrack supports customer due diligence has also been key. From Verification of Identity and Source of Funds checks to questionnaires and client information, the firm can easily obtain the information they need to complete their risk assessments.

Further value is added with the advanced reporting available within the InfoTrack dashboard, making PII renewals a less stressful process. Amy tells us “The InfoTrack risk mitigation report was super helpful for our PII renewal. Having the information on how we manage risk with the data to back it up was invaluable and helped us stand out when brokers went to insurance companies with our proposal form.”

The final piece that extends beyond the conveyancing process is the positive influence end-to-end digital conveyancing is having on the wider business. InfoTrack and LEAP have been instrumental in the firm being able to operate remotely with ease.

“The flexibility of home working has been a big factor in our recent recruitment. Without this option, our last two conveyancing recruits, a fee earner and an assistant, would not have joined us,” notes Amy.

Rounding out the package is attention to customer service and client care, which Amy says has been focused on building strong relationships between Lucas & Wyllys and InfoTrack and customer service that is efficient and helpful.



The final word

When asked what advice Amy had for her peers and whether they should use InfoTrack, her words were ‘[they are] a joy to work with’.

“Embrace the technology and go for it. You will find some bumps in the road whilst you are getting used to the solution, but once you are familiar with it, you will find it a breeze,” Amy reveals.

She continues, “InfoTrack and LEAP integrate so seamlessly that it is a no brainer to use them together. Both solutions are intuitive and make day-to-day life as a conveyancer much easier. With the conveyancing world so busy, any time that we can save is precious.”

Find out how you can start your journey
with InfoTrack. Get in touch today.



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