

**Using technology to improve service delivery, workload management and improve client satisfaction**

**GILLESPIE MACANDREW**

Plot sales at Scottish firm Gillespie Macandrew is all about delivering volume activity and having status information immediately available for both national and small scale developers. A team of four full-time paralegals led by a young qualified solicitor manage this high-pressure work stream, processing over 1,100 sales per year – and making up 6% of the firm's £10m turnover.

"Like a lot of firms, between 2008 and 2013 we had to batten down the hatches," explains Chris West, chief executive officer at Gillespie Macandrew, "but we've emerged into today's extremely competitive ABS world reinvigorated and restructured, and more than ready to embrace technology to support the growth of our business." Plot sales is high-volume, lower-margin work area that is often fixed price but, says West, it also enjoys a relatively short debt cycle so it helps powerfully with the firm's cash flow. "We need to support rapid and effective delivery of this work – to say it's critical to maintain competitive position is not an understatement."

The firm's existing practice and case management solutions were unsuitable for the plot sales unit, so there was little technology in place to drive more efficiency in this process-heavy work stream. A number of team changes led to increased client pressure on service and made the existing way of working untenable. Consistency, plus the ability to work as a team rather than a group of individuals, was needed – urgently.

"We needed to mitigate the impact of team changes and show clients our commitment to their goals," says West. "Plot sales is a busy area – if people are away, backlogs can be quickly created. That means pressure on our people and the client relationship." So, the firm needed to find technology that would improve service delivery and increase efficiency to improve client satisfaction, workload management, completion timescales and financial forecasting.

"We were looking for a solution that would give us the ability to make workflow and document changes within the team, with no special IT skills, just reasonable aptitude that the team innately has to create and produce the system they need, not one designed by IT."

The design tools inside Linetime Liberate are easy to use, and it's simple to create forms and workflows within the software with no technical knowledge – one of the key reasons Gillespie Macandrew chose Linetime to work with. "Changes can be accommodated by the team quickly and easily, with no delay and we can be confident the changes have actually happened – because we're in charge of them."

However, to get a software implementation delivered quickly you need proper commitment from both sides of the table – provider and firm. This meant allocating people to the project and finding a partner with the same serious commitment. "We created a process model for all plot sales, and worked with Linetime to tailor the system specifically to the plot sales team's needs. In the development phase for the Scottish legal process, the Linetime people must have been learning some of this as they went, but it didn't show."

This committed and proactive approach reduced the implementation time from five to just three months. "Linetime made this happen. Their training and development teams in particular have been

excellent. They know the system, work well on site, and manage communications between technical and non-technical people expertly. The rapid installation was outstanding and is a real tribute to Linetime's commitment and approach and to the engagement of our team members."

Gillespie Macandrew were also sensible in the adoption of their new approach, says West. "For the first phase, we looked at what we needed and we achieved everything. Now we can look at some 'good to have' extra functionality, which is above and beyond the initial requirement." The firm's decision team also made the choice to allow existing plot sales to run their course, only using Liberate for new plot sales.

How the firm uses Liberate is entirely structured to manage cases on a team rather than an individual basis. Any team member quickly knows the status directly from information immediately available on the work done to date, not from secondary reporting. And having great visibility into how work is going provides vital management information.

"Ad hoc client requests can now be fulfilled rapidly and accurately, with no extra work. We have the ability to plan, balance and allocate work. Understanding team pressure levels and under/over-capacity areas helps us use resources more efficiently and fairly and that's very valuable.

"We now have a very clear workflow. The system is used day in, day out and under pressure, and we haven't used Linetime support since go-live. We can do it alone and we're in control. The end-user interface is well designed and intuitive, making it well suited to people with all levels of experience of a case management system. The application looks fresh, modern and is easy to navigate. Even two new users not involved in the development are as happy as the original team. It's certainly contributed significantly to improved team morale. We're almost shocked at how well things have gone."

Given that Microsoft Outlook is the firm's key communication application, links to and easy integration between Outlook and Liberate were very important, but as West explains, Liberate does this without ever having to leave legal's staple email client. "Allowing operations to be carried out within Outlook without the need to move to and from the main application makes for a very positive user experience."

The system's prompts and alerts drill into a wide range of sources, ranging from personal diaries and notebooks to review documents and even notes from memory. "It's all in one place – we can add target dates and set reminders, or colour code screens to help make sure we're on top of the workload. It has helped the team a great deal in coping with the volume and client needs."

Cutting down on paper has also been an important part of the new process. "Electronic history within the application allows users to have a full document record without the need to print, which was a major objective of this project. So far we are very pleased with the outcome. Granted, we need some paper documentation for compliance reasons, but we've had a rapid and significant reduction in the use of paper, leading to multiple benefits, from reduced paper storage and usage to improved findability."

The firm hasn't yet done formal return-on-investment analysis after moving to Liberate, but West says that's because this was a business essential – you can't always work out ROI on a basic need.

"We had to get a system that we could use without IT support extremely quickly to sustain our client relationships. We could foresee a potential for major issues within the team – we'd lost some important knowledge in the staff changes and two key clients had year ends approaching. In terms of those drivers, we have most definitely achieved ROI."

The combination of better knowledge management and workload management has improved responsiveness to clients. "We've changed from being reactive to proactive, and we are now controlling the processes. The team leader was frustrated with the situation but is now very comfortable with what has been and is being achieved. The lack of a good case management approach meant it was harder to attract and train staff, which put the service under more pressure. Implementing Linetime with this team has changed this materially. The residential conveyancing and private client guys are going to look at how Linetime might also work for them."

Next up, West is keen to better understand in more detail the contribution plot sales bring to the firm. "Not just in overall team margins and rough contribution to overheads, but to understand which customers are more profitable and how team members contribute. Liberate will help us deliver work more efficiently and allocate work more fairly, enabling our people to work more productively."

West says the firm is likely to consider Linetime's solution beyond the plot sales people. "We'll be looking to change our PMS in a couple of years. We like the Linetime product roadmap, the lifecycle and of course the approach to implementation. Linetime's development plans are important, and their commitment to this is likely to help grow the application's use within Gillespie Macandrew."

The reason for this is capability plus a good dose of ease of use for everyone using the system, says West. "It's been easy with Liberate to start from a blank position and develop a system of forms and workflows that meet and exceed requirements, without any technical knowledge and in a short timescale. There is too often a big difference between what you are sold by technology people and what developers implement, but in this case we got what we were sold and it works for us."