

# Gotelee Solicitors: Case Study

Partnering with Gotelee Solicitors LLP, to improve efficiencies, increase productivity, and ensure connectivity within software



## LINETIME PROVIDE GOTELEE SOLICITORS LLP WITH A FLEXIBLE, SCALABLE SOLUTION TO SUPPORT LONG TERM GROWTH

Gotelee Solicitors LLP is a full-service law firm with offices operating in five different towns in Suffolk. The firm is comprised of 109 staff and has a well-established presence throughout the county acting for private individuals, families, businesses and organisations.

During 2019, Gotelee Solicitors realised the current practice management system and associated IT infrastructure was not meeting the needs of its business. To address this, Gotelee decided to conduct a full review of the IT infrastructure alongside legal technology providers to deliver 4 clear goals:

- Improve time efficiencies for all staff, with a particular focus on fee earners.
- Improve communications between offices, staff and clients.
- Minimise a reliance on paper and associated costs, including printing and postage while freeing desks of files (paper-lite).
- Implement a high-performance IT infrastructure, with continued remote hosting of servers.

## REVIEWING THE MARKET

Gotelee Solicitors recruited the IT specialist skills of David Baskerville of Baskerville Drummond to perform and drive the review process. Baskerville Drummond spent time investigating the market,

spending time with various vendors before providing a preferred list to Gotelee, which included both Oosha as a hosting solution and Linetime as a legal business management system.

Gotelee was introduced to both parties and for IT Manager, Chris Winterburn, there was clearly a working relationship between Oosha and Linetime that others lacked. Chris comments, "Like any firm, we are very conscious of selecting providers who can service the needs of firms now and in the future. It was apparent to us from the outset that both providers clearly had a strong proposition. That was proven with many of our performance related questions being addressed within our initial interactions with both Oosha and Linetime."

Once past the first stage of selection, Gotelee identified key features that would be required in order to achieve its strategic goals. First, was a need for easily designed business processes and workflows to manage the fee earning and accounting functions of the business. Second, were rich feature requirements, including automated time recording, improved financial management with faster invoicing and payment functionality built in. In parallel, to deliver against fee earner requirements, the system would need powerful integrations with postcode lookup, AML providers, electronic signatures and conveyancing search providers. Importantly, the system needed to be flexible and simple to use.

Chris comments, "Once the principle is understood, Linetime is simple and far easier to use than other systems I have used previously; especially when setting up business processes and workflows, including creating a full client onboarding and file opening system. The built-in design tools are great.

Being paper-lite is an ambition for many law firms. Previously, our IT service issues resulted in us being forced to a paper-heavy default, which always seemed quicker. However, with Linetime being hosted on Oosha's servers, we have been able to quickly reduce the reliance on paper and the costs associated to printing and even postage.

With wet signature-based authorisations internally, the need to process cheques or even Chaps authorisations has always been a lengthy process, with a propensity for documents to be delayed internally between offices. Linetime demonstrated solutions to resolve this issue with a smarter inbuilt billing system which works in harmony with the business process management feature, enabling authorisation processes to be conducted digitally.

Add to that functionality Oosha's hosting solution, a faster system with clever functions was a no brainer. Put simply, it was obvious to all of us within the firm that everything could be operationally faster – even enjoyable – with actions taking seconds, rather than days, and we would even have a clearer, reportable audit trail."

## IMPLEMENTATION STRATEGY

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January 2020 was welcomed with unexpectedly high volumes of business. Nobody could have foreseen the restrictions that would be caused by a global pandemic. As the nation realised a lockdown was inevitable, Gotelee began to consider options relating to implementation, including delaying training.

As Caroline Bellett, Head of HR and Facilities comments, "The pandemic created a series of challenges to completing our go live date. We were heavily biased towards a traditional office working environment, with a few people working remotely at home in normal times. The pandemic left us with a series of decisions to make, including how we manage our business from home and continue the IT implementation.

Linetime stepped up to very quickly implement an online training schedule. With servers being hosted by Oosha, we realised that performance shouldn't be an issue and, as awful a time as it was, it really was an excellent test of our new partners, Linetime and Oosha. I don't really need to dwell on the data migration front because it was performed so quickly and with little fuss by Linetime, despite the associated complexities and potential for issues to arise. Our real challenge was training the many users at a time they weren't in the office.

The Gotelee team was fantastic during training with near enough to 100% logging on from bedrooms, kitchens and home offices for online training, without

an issue. Yes, it challenged our comfort zones, but our teams responded really well, helped by members of the Linetime training team who were knowledgeable, patient and friendly. In fact, from selecting our legal tech provider all the way through to present day, working with Linetime has been a pleasure. The people, their experience and their communication has been fantastic throughout the entire project."

Andy Hawley of Linetime comments, "As the pandemic took hold, we were suddenly having to support dozens of individual offices, rather than our five workplaces, as almost everyone was working at home. The adjustment to global homeworking presented a challenge but, with support from Oosha, we were able to find solutions to the issues that homeworking raises, we were able to implement and train in order to ensure staff were live on Monday 21st April, right at the height of lockdown."

## A COMPREHENSIVE SOFTWARE SUITE

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Originally, Gotelee's goals existed as part of a business strategy. As 2020 took an incredible turn, the strategy and decisions meant Gotelee was in a great position to adjust and evolve to a home working model as the UK entered a national lockdown. With the challenges to businesses brought about by the Coronavirus epidemic, Andrew West, Managing Partner of Gotelee, necessarily had to budget on a far more pessimistic basis for the 20/21 financial year. However, Andrew recognises that, by implementing the Linetime platform upon Oosha's hosted services when they did, Gotelee was able to drive efficiencies that were not available to the firm previously.

Andrew comments, "The built-in quotation system is very good and the intuitive nature of Linetime with its drag-and-drop interface and outstanding Outlook integration, has allowed us to transition from a full paper-based environment to "paper-lite" in just a few months. This has enabled working from home and more efficient working methods. Crucially, the longer-term aspect of working at home enables us to provide staff with a more flexible approach to working in a law firm and we anticipate people, going forwards, will want the flexibility to work from home or in the office.

Certainly, one of the key features of Linetime is the fool proof time recording, allowing us to capture more recorded time, while the reporting functionality ensures we are being productive by using the efficiency driven features. Our decision to partner with Linetime and Oosha has led to a dramatic reduction in paper heavy files, which, with people at home, has been critical."

Andrew believes Gotelee is now set for a solid future and is better prepared to deal with challenges in the future, saying, "People have settled into using Linetime very quickly and, although the pandemic raised a number of challenges, I was absolutely delighted by our own team's motivation to step up. Linetime and Oosha paved the way for a smooth transition, so I now think we have a very bright, scalable IT future, which will benefit us greatly moving forwards."

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