Briefing

SMARTER LEGAL BUSINESS MANAGEMENT

Buying signals

*What do law firms make of the latest signs coming from
the business of legal service procurement?*

Grow faster

Leading residential remortgaging law firm O'Neill Patient Solicitors is investing heavily in technology to introduce a set of process changes that translate into improved client experience. Legal cloud specialist CTS helps to ensure any risk that accompanies strategic transformation is always rigorously managed, says group chief technology officer Andrew Taylor

P rocessing as many as 88,000 conveyancing transactions a year, O'Neill Patient Solicitors (ONP) has long held investment in the right supporting technology to be a central pillar of its growth strategy. For example, the firm's 'online case tracker' enables customers to update details, maintain regular contact and follow the progress of the work they're paying for online.

However, the Cheshire-based firm has recently embarked on a new strategic phase. In July 2019, it secured private equity backing from Inflexion, which immediately allowed it to acquire another leading conveyancing specialist, Grindeys – consolidating market share in this notoriously competitive, margin-pressured slice of the market. Now Inflexion's dedicated digital team is working with ONP management to develop technology that takes the client experience to another level.

Driving this effort is group chief technology officer Andrew Taylor, who says the firm's mission has been to drag the rather persistently "old-fashioned" image of conveyancing into the modern age of meeting consumer expectations in terms of service convenience and communication. That means less hard-copy paperwork to wade through of course, but also less of a requirement for clients to take as many hours out of their time-poor days to keep on top of the particulars of a case.

As ONP moves into this period of transformation, the firm has also expanded a relationship with its long-term managed IT and cloud partner CTS to ensure the existing technology infrastructure facilitates this change, centralising its IT operations, keeping pace with the transformation work to maintain process efficiency, anticipating issues before they impact on day-to-day operations, and underpinning the role of business-continuity planning.

Invest to impress

"The firm has already embarked on a digital-postroom project to move on from what was a highly manual internal process," says Taylor. Paperwork arriving is automatically scanned into its digital equivalent, which of course has the efficiency gain of needing less storage space in addition to reliably capturing data that may be used for continuous service improvement as well as day-to-day delivery.

O'Neill Patient has also been rolling out Kofax robotic process automation (RPA) software to streamline some of the more repetitive, information-intensive actions, such as downloading key details from other sources and sites into relevant fields.

"We've initiated a lot of integration with HM Land Registry over the years, which has been really good for business efficiency," Taylor adds. "Now we want to apply the same principle at the front end of improving clients' user experience."

For example, he says, customers won't need to do as much manual posting of signed documents, with the ability to upload to a portal instead. 'Know your client' (KYC) regulatory compliance and onboarding work also has strong potential to be streamlined, while the possibilities of mobile access to such "associated services" is another area to benefit from the recent investment, he explains.

Cloud and continuous improvement

All of this builds on O'Neill Patient's long relationship with the Lexis Visualfiles case management system – supported by CTS – both of which have enabled optimisation of workflows to pave the way for the firm's strong growth trajectory to date. CTS helps with the fine-tuning of individual applications within the estate and scopes the overall environment in line with

business efficiency objectives.

Taylor says the firm also sees significant value in the latter's own "very long-term relationship with – and therefore detailed knowledge of – the Visualfiles system, but also deep experience and expertise partnering with suppliers to the legal sector across the board". Specifically, the pair have worked together on ONP's managed cloud strategy, backed up by managed support and business continuity, with managed security for advanced threat protection.

"With an average of 10,000 completions a month, system downtime simply is not an option," Taylor continues. He has been managing the process of regularly testing the firm's resilience for eight years, with CTS taking backups and ensuring file and application recovery to mitigate that business-critical risk

effectively. He's very pleased with progress in achieving the firm's recovery point objectives (RPOs) and recovery time objections (RTOs) respectively, he says.

More generally, ONP can rely on the fact that CTS is always there behind the scenes, rigorously "measuring and monitoring systems, so ONP's own technology experts can focus on more strategic changes", says Taylor – such as those centring on the client journey.

But it also played a part in one recent example of ONP's strategic tech transformation – namely, moving from a multi-cloud environment for applications to "ring-fence absolutely everything within the one private cloud – with just the one way in and out." O'Neill Patient is a firm that clearly sees the value in radically simplifying some of the business of management for itself, just as it does for its valued customers. ◣

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