



Paris Smith PMS Selection

Defining the application strategy and supporting decision makers to make an effective and informed choice.

Paris Smith

A Practice Management System lasts for 10-15 years. It's the one system that can change a law firm. PMS selection has no room for error. The selection process is as important as the system selected.

Paris Smith

Paris Smith LLP is one of the largest regional law firms in central southern England, based in landmark offices in Southampton and Winchester with 43 partners and employing over 200 staff.

The firm provides a wide range of services from agriculture, charities and education to corporate advice and banking. It is regarded as essential that these different areas of work have their own independent way of working whilst, at the same time, the business takes advantage of centralised systems.

The Challenge

Paris Smith is facing the unenviable task of changing its practice management system (PMS) as LexisNexis Artiion reaches end of life and will no longer be supported in 2020.

The firm currently uses several different stand-alone systems resulting in duplicated data, duplication of effort, inefficiencies and the inability to see the 'whole picture'. It was recognised this was a once in a decade opportunity to consider all operational requirements across the whole business and to streamline business processes and enhance data management.

The PMS change will affect all other legacy technologies and applications in the business with eight solutions becoming one.

Baskerville Drummond was tasked to support, rather than control, the selection process to ensure best practice is undertaken.

The Process

Baskerville Drummond's process for product selection ensures that a holistic approach is undertaken with six areas of focus:

- ▶ Financial
- ▶ Risk & Compliance
- ▶ CRM & Marketing
- ▶ Matter & Case Management
- ▶ Document Management
- ▶ Reporting.

The first phase of the project is to prioritise, using the MoSCoW prioritisation framework, Baskerville Drummond's 623 standard PMS requirements, to ensure the focus is relevant to Paris Smith.

Further interviews with staff and stakeholders identify additional requirements which are unique to Paris Smith.

Key strategic success factors were derived from workshops with the key stakeholders and detail several individual success factors for each area:

- ▶ Business
- ▶ Client
- ▶ Operational
- ▶ Efficiency
- ▶ End-user.

This approach ensures we have full knowledge of Paris Smith's requirements and enables us to identify the solutions that could address all of these in a comprehensive way and therefore make recommendations as to the best strategic direction.

Vendors were requested to complete the Request To Tender (RTT) stating for each individual requirement how their systems achieved the required functionality. They were also required to detail how their systems would achieve the strategic success factors required.

Following analysis of responses and recommendations to the steering group, demonstrations from the leading two vendors were invited, and Baskerville Drummond provided a detailed agenda.

Once the preferred vendor was identified, the requirements documents were cross referenced with supplier contracts to ensure that all of the feature requests will be available in the PMS.

The Outcome

Paris Smith moved from basic headline objectives and a pool of potential suppliers to having a detailed strategy and a preferred supplier within 15 consultancy days.

An immediate saving was achieved from the selection process with an integrated CRM solution being available as part of the application offered by the preferred supplier, rendering unnecessary the purchase of a additional solution.

Significant savings are achieved by the elimination of maintenance costs of seven systems.

Other key success factors to be achieved from the PMS implementation. These include streamlined CRM and marketing integration, cost savings by removing paper-based processes and GDPR compliance.

The improved functionality will support the firm's:

- ▶ Operational performance improvements
- ▶ Client Relationship Management
- ▶ Knowledge Management
- ▶ Client Portals
- ▶ Reporting.

Paris Smith is now ready for the implementation project.

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We are confident in our choices and excited about the future of our business. The selection process has helped us with our strategy and it's brought cohesion throughout the firm.”

Edward Power
LLP Partner
Paris Smith



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Baskerville Drummond brought a proven methodology to the selection process, the knowledge of experience to implementation, and a trusted advisor in the form of David Baskerville throughout. We have found the guidance and support invaluable.”

Edward Power
LLP Partner
Paris Smith