



## This firm discovered a new way of working using P4W and TaskCentre

An innovative approach helps them to work more efficiently and deliver services that offer exceptional value to clients

Knights plc serves clients across the full spectrum of legal and professional services, including dispute resolution, corporate, regulatory, wills and estates, conveyancing, family law and much more. As the leading UK consolidator of legal and professional services, Knights plc functions with local decision making and a culture of transparency, putting people at the heart of what they do.

### Introducing a new way of working

As a part of its overall approach to working, Knights plc was looking to introduce a practice case management system that would enable lawyers to do more for themselves.

During a demonstration of P4W, it was recommended that adopting TaskCentre at the same time would enhance the functionality of the core system. This would meet one of Knight's objectives by automating the delivery of key information to lawyers and managers, without them having to search for it manually.

Nigel Johnson, IT Director at Knights plc, explained: "We were clear about our expectations of the P4W / TaskCentre combined solution. We wanted to provide visibility of information to key personnel and lawyers so they could take ownership of their client relationships more effectively."

It was obvious that the firm required software that would enable it to manage a client matter throughout the entire journey. P4W ticked all of the boxes by being able to provide access to client matters from any office, ensuring current documents were available and enabling lawyers to produce a bill.

Knights plc also believed this technology would provide the ability to successfully manage client relationships. When a client contacted the firm, they wanted their lawyers to be able to access information in real-time and not have to rely on someone else to explain the matter.

### Automated information alerts

TaskCentre monitors P4W, collates information and delivers it directly to those that need it. This increases process efficiency, keeps communication channels open and provides an improved view of client matter progression.

TaskCentre introduced automated alerts and report delivery, based upon the specific information each user would need. For lawyers, it highlights where actions need to be taken, such as an overdue bill, so issues can be quickly solved. Management teams also receive financial updates. Daily summaries for new matters opened, and amount quoted, allow them to ensure fees meet expectations, and to provide support to colleagues when needed.

**Knights**plc

### Client >

Knights plc

### Sector >

Legal

### Project >

Implementation of P4W practice case management and TaskCentre

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Nigel Johnson >  
IT Director >  
Knights plc >

### **Informed decision making**

Nigel Johnson summed up how they use automation by saying, "We use TaskCentre as a tool to encourage people to engage directly with clients, rather than as a means of saying you've not completed something. TaskCentre is used to identify issues or bottlenecks so we can put improvements in place. It's allowed us to open up dialogue and that's built confidence in being able to follow-up appropriately and proactively."

While the big focus of this solution is on people, both internally and externally, there is also a financial element that comes from the wealth of information available in P4W.

Nigel explained, "Ultimately, we're able to use the information we receive to forecast financials. On average, turnaround on matters is three months, so we can see what we've quoted for and have visibility of what we can expect to achieve."

### **Achieving more, with less**

Prior to adopting these solutions, the amount of data that's automatically monitored, formatted and delivered would not have been possible through manual creation.

Nigel asserted, "To achieve what we do now, we would have needed a minimum of two people, working full time, just to prepare this information. That's only for the daily tasks. I couldn't even quantify the resource that would be required to manage other instances, such as a file going beyond a due date.

There's also a substantial amount of automation through reports and locking of matters. From a compliance perspective, we'd have also needed a much larger team to handle that if we didn't have the automation that TaskCentre provides."

### **Benefits at every level**

TaskCentre works diligently in the background for Knights plc, ensuring all employees are kept up-to-date. The management team now benefit from top level reports and 100 other colleagues, with team leader responsibilities, also receive relevant daily reports. Furthermore, around 500 lawyers are now equipped with information they need every day as a result of TaskCentre.

Knights plc have found TaskCentre to be worth the investment. Beyond initial use, as they start to get to know the product, they're thinking about additional tasks and processes. With over 80 upcoming projects, input from various areas of technology will be required. Whenever they require automation, TaskCentre will be the option they explore first.

#### **THE CHALLENGE**

- Implement practice case management
- Automated delivery of key data to staff
- Lawyers developing client relationships

#### **THE SOLUTION**

- Automated delivery of management reports
- Automated summaries of new matters opened, status of work etc.
- Monitoring systems for overdue bills

#### **THE RESULTS**

- 500 lawyers receive daily updates
- 100 team leaders benefit from automated reporting
- 10 senior employees receive automatically generated top level reports
- Information enables successful forecasting

## **More information**

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