



P4W and FormShare automation

GT Stewart restructured client inception at police stations and made criminal law financially viable

Our firm was set up in 2003 by a group of lawyers who wanted to fight for clients irrespective of their ability to pay. Today, we have 175 staff across a national network of offices. We've been nominated and shortlisted for many legal awards and are recommended in the leading legal directories, Chambers UK and the Legal 500.

From the outset, we recognised that the climate for publicly funded work was increasingly adverse. By 2018, we had withstood a decade's worth of Legal Aid fee cuts. To continue our mission to practice criminal defence law, an area of practice which makes a loss much of the time, we had to find a way to radically cut costs.

FormShare software gave us an opportunity to do this. We had taken part in a P4W User Group initiative in which 14 firms had pooled their resources to each develop a form they needed using FormShare. This showed us what could be achieved, and in June 2018 we started work on the creation of an automated police station onboarding form.

Our key goal was to drastically lower the costs of police station client inception, in order to increase the financial viability of giving criminal law clients access to justice.

The challenge

An automated form could make a huge difference by cutting the administration needed to onboard criminal law clients. The standard process was messy, time consuming and costly.

It started with manual form filling at a police station, followed by the manual keying of information into the firm's database once the physical form was back at the office.

It was an error prone process as administrative personnel struggled to decipher the handwriting of others. The numerous pieces of paper involved meant it was also insecure. In addition, as the information provided might be incomplete, there was every chance of further delays which could negatively impact the client experience. All those issues arose even before the data could be used to manually create new client and matter files.

This process also had a big impact on the client's access to justice because data gathered at the police station is used not just for inception, but also for the client's defence in the hours, days and months to follow.

Our challenge was to use FormShare software to streamline and automate as much work as possible. We needed to reduce costs and improve data quality and security. At the same time, we wanted to create a process so simple, compliant and secure that even the most technophobic lawyer would instantly see the benefits and use it.

The innovation

A project team was convened under the direction of our Practice Director, Melanie Krudy. Expert advice on project and change management was also contracted in. Our starting point was the inherited prototype form created by the P4W User Group initiative.



Client >

GT Stewart

Sector >

Legal

Project >

Integration of FormShare into P4W

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The project team's first task was to look at the form and decide how far they wanted to develop it. The decision was taken to build a solution which would achieve the maximum possible process automation.

Harri Clement, our Practice Supervisor, was responsible for the technical creation of the form. He tested it to ensure it worked with clients in situ at police stations, for lawyers and other firm representatives. The project made good progress and by November 2018, we soft-launched the system in one of our offices.

Work started on change management to ensure the new system was widely adopted, and we invested in new, lightweight laptops to support its implementation. We conducted training webinars in January 2019, and on the 21st, the new system went live nationally across all 11 of our UK offices.

The outcome

Now a digital form, held on a laptop, is completed at police stations. This carefully structured, nine-page form ensures that data collection is accurate, complete and efficient. A time record is also created. Information can be captured offline or online and is instantly encrypted to ensure it remains secure.

Once submitted electronically to the firm, the data goes directly into our P4W practice management system where the software instantaneously:

- > Checks for conflicts
- > Executes a compliance check
- > Where required, opens a new client record
- > Opens a new client file
- > Records complex legal aid time and fixed fees

Stage 2 of the project streamlined the client care and advice documentation generated from data captured in the form. This also initiates the automated billing process. We rolled out a court advocacy form in May 2019 with similar functionality.

More information

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The impact

This is the first project of its type to use FormShare nationally to export police station data directly into the firm's practice management system and automate relevant processes. It has slashed administration overheads and is having a profound impact on our operational efficiency:

- > Improved data accuracy and completeness
- > GDPR compliance is built in
- > Sensitive information remains secure and confidential
- > Some 35 minutes are saved per onboarded client. With 2,000 police station clients onboarded in 2018, this suggests a total annual saving of 1,166 hours, the equivalent of 166 days, or roughly 7 months' work.

Since adopting this technology, we've expanded its use to new client inception across civil law. FormShare is used for most onboarding, whether the firm takes on the client or not. The system can generate valuable information on reasons why cases are not taken on, as well as monitoring the speed of conversion. We've also been able to undergo some restructuring to redeploy client onboarding staff to higher-value activities.

FormShare provides us with far more transparency. The data collected on prospective clients is always handled in compliance with GDPR. Most importantly of all, the extent of the cost reductions we've achieved has helped us reach our key goal of providing criminal defence law efficiently.

By embracing this technology, at a time when other firms are contracting their criminal law practices or closing them down, we've been able to expand through a merger with FMW Law. We've also shared the technology with other firms, enabling them to develop it quickly without going down the same development pathway.

In essence, the automation of police station onboarding, advocacy and case management using FormShare and P4W has enabled the continued practice of criminal law to become economically viable for our firm.