



Practice Management Software



Case Study:

# Bamboo UK

How Bamboo Uses Actionstep to Create Custom Workflows,  
Save Thousands of Pounds on Admin, and Delight Clients





## Introduction

Bamboo owns one of the UK's leading alternative business structures (ABS) for law firms, Carbon Law Partners. Bamboo enables law firms to start, grow and exit. For new law brands its white-label platform enables lawyers and non-lawyers to establish a firm using an SRA-regulated structure. They can do so on their own terms, under their own brand. These law firms are referred to as "platform law firms".

Bamboo was looking for a practice management solution that could serve its diverse range of partners and firms under one system, totalling over 60 users. However, it knew each platform law firm had their own requirements—so customisability was priority number one.

After an extensive search process back in 2017, Actionstep was chosen as the Group's cloud-based practice management software. The partnership has been even more valuable than Bamboo could have imagined. We recently caught up with Michael Burne, CEO of Bamboo, to dig into how Actionstep has transformed its platform law firms' efficiency and client satisfaction.

## Setting the Criteria for Bamboo Law Firm Technology

Bamboo's first law brand, Carbon Law Partners, was already using a practice management solution since it was established in 2014. However, it simply wasn't up to scratch—and Burne realised the firm needed a much more versatile solution.

Keen to ensure they selected the right tool this time around, Carbon devised a specific set of criteria by which to judge each option.

Carbon had four key priorities. The solution had to be cloud-based, adaptable, versatile, and secure. In fact, it had to be appropriate for several different law firm business models in differing practice areas



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## Why Bamboo Chose Actionstep

With these criteria in mind, the team set to work. They conducted extensive online research, consulted contacts in the industry, and explored various options, such as Quill, SOS Legal, Advanced, and Clio.

However, Actionstep soon emerged as the clear front-runner.

“Actionstep’s configurability immediately stood out,” says Burne. “We could easily adapt it to each of our partners’ specific use cases without needing to know how to code. This was a major plus.”

But that’s not all. Bamboo has a unique set-up, with multiple separate business entities (their partner law firms) on one platform. They wanted to accommodate each brand and consultant’s operations within the same system. Therefore, they needed to enforce strict internal firewalls. This is similar to how larger, multi-practice law firms require ethical walls between practice areas or teams working on different clients or client matters.

“We needed a system that meant if one of our platform law firms had a client, for example, nobody else could speak to that client. The software had to store everything in one place, yet allow us to separate who could access which files, speak to which clients, and so on. It was a massive relief to hear that Actionstep could do this.”

This led Carbon to sign with Actionstep in November 2017. They proceeded to work closely with the technical consultants that Actionstep recommended before going live three months later.

“I’m glad we took the time to set everything up correctly”, adds Burne. “We’re just about to undertake another upgrade, but we managed to use this original configuration for the past five years without any hitches whatsoever”.

Burne and his team at Bamboo have now rolled out Actionstep to all their platform law firms and brands, including one firm who had previously used a competitor.

“Despite its shortcomings, they’d got used to using this alternative system—so they were hesitant to switch over. We convinced them to take the plunge by explaining we could create their very own Actionstep system, taking everything they loved about the prior tool and fixing everything they hated. They were amazed at its’ configurability. Now, they absolutely love Actionstep.”

As Bamboo continues acquiring more practices, they’ll continue with this approach: returning to the core of Actionstep, adjusting it to the use case, and refining as necessary.

“It’s that combination of functionality and flexibility that sets Actionstep apart,” adds Burne. “The system is so customisable—your imagination is the only limit.”





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## Transforming Productivity Throughout the Bamboo Group

Actionstep has skyrocketed each and every one of Bamboo's platform law firms' productivity.

For example, one fee-earner operates with a high-volume, low-margin business model. This approach incurs plenty of admin—so they were considering hiring a couple of employees to help out.

Thankfully, they started using Actionstep just in time. The tool allowed them to build a custom workflow that automated the bulk of their reminders and admin tasks.

As a result, they avoided hiring additional employees, saving the business between £20,000 and £40,000 per year. And, they've done so while generating more 5\* reviews for customer service than any other Carbon partner.

More generally, Actionstep has liberated Bamboo platform law firms from wasting excessive time managing client communications.

"I'm most impressed by the Outlook integration," says Michael. "In the past, our lawyers consistently bounced back and forth between tools. They'd email a client in Outlook, switch over to their practice management system to file the message in the right place, and repeat this process endlessly."

This was a tiresome drain on fee-earners' productivity. But nowadays, lawyers and staff working on Bamboo's Actionstep platform no longer have to think about filing emails.

"Actionstep automatically files all communications. It even uses machine-learning to work out where to file a certain message, meaning the system becomes increasingly effective the more you use it."

## Unlocking New Levels of Customer-centricity

Every Bamboo platform law firm requires different things from their practice management solution. Fortunately, this is where Actionstep's flexibility stands out.

"The ability to configure workflows with no/low-code really appealed to us. We have a fairly unique way of handling client engagements due to the nature of our business", explains Burne.

"Unlike other systems, Actionstep didn't force us to be a square peg in a round hole. We could establish workflows specifically geared towards how an individual partner, or a practice within our business, wanted to operate."

Take Unique Solutions, for example, a law firm operating in the consumer litigation space. Unique Solutions realised many of its clients would appreciate text reminders rather than having to email their solicitors constantly.

The firm wondered whether Actionstep could help. It certainly could.

"Unique Solutions created a custom solution using Actionstep's APIs. Now, the system automatically stores all texts between fee-earners and clients in the relevant client file. Their solicitors don't need to lift a finger".







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## How Actionstep Helps Bamboo Enter Uncharted Territory

Bamboo is on a mission to boost efficiency and client satisfaction. That’s why they’re about to release a ground-breaking update, leveraging Actionstep’s flexibility and open API to use Actionstep and Legl to create a custom automated workflow.

This will allow lawyers to identify and verify clients, send them an engagement letter, digitally sign, put their details into a client file, and deposit money on account of expected fees/disbursements of costs.

“We’ve been behind the curve when it comes to onboarding new clients. I didn’t want to have one system for identity verification, one for electronic signatures, one for digital payments, and to then plug them all into Actionstep”, Burne explains.

“So, we have partnered with another leading application provider who are building an API link into Actionstep – one solution not several conflicting systems to manage. It’s incredibly slick—I can’t wait to roll it out.”

## Bamboo’s Recommendations for Law Firms Looking To Implement Actionstep

Burne recommends that firms determine exactly what they want to achieve before implementing Actionstep.

“It’s like when you go shopping. If you don’t have a clear list of what you need to get, and what you want to make, you’ll end up getting lots of bits and pieces that don’t go together. Have a plan in place for how you’ll use Actionstep. Go in with a clear understanding of what you want to achieve and which parts you’ll need to customise.”

Burne continues to share how to benefit the most from leveraging Actionstep. “Actionstep’s so customisable that I truly believe it’d benefit any firm. However, don’t mistakenly assume you can instantly get it to do whatever you want. You’ll have to put in a bit of legwork to set it up correctly. But once you do, it’ll be well worth it.”



## About Actionstep

Actionstep is a fast-growing, dynamic SaaS business with a global customer base and team, specializing in the delivery of legal practice management software to mid-size law firms around the world. Actionstep combines CRM, Matter Management, Document Assembly and Management, Time and Billing, Trust and Office Accounting, Reporting, and much more in one adaptable cloud-based software platform for thriving modern law firms.

[www.actionstep.com](http://www.actionstep.com)