



GloverPriestSolicitors

## Online Will Planner



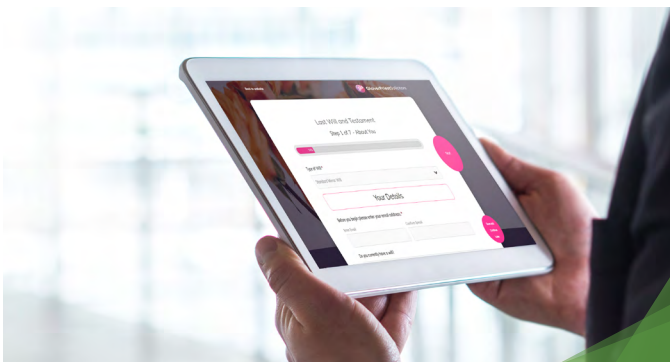
GloverPriest have been using P4W for over two years and the Accesspoint Legal Services development team initially helped them write their Sale and Purchase case flows in and around their existing practice management system. First off, the case flows were reviewed and then overhauled with additions made where appropriate, then GloverPriest and the ALS development team worked with a third-party consultant to fully integrate with Perfect Portal.

This included the creation of managing partner tables and XAML screens which populate the figures directly from Perfect Portal. The auto population of completion statements and bills also proved itself to be beneficial.

More recently, the Accesspoint Legal Services team have worked with GloverPriest to add the new and innovative Online Will Planner for the firm to utilise across their online activities.

The Online Will Planner directly addresses the problem GloverPriest and their clients faced on a regular basis, as many clients start their legal journey not knowing where to start when creating a will and the last thing GloverPriest wanted them to deal with was an overwhelming and complex process with too many steps.

The Will Planner offers a simple way to gather information from the client, through a remote web-based process, that can be completed in as little as three steps. GloverPriest's new Will Planner has been tailor-made to suit the firm, from the layout of the form providing a sleek suitable look that matches the rest of the firm's branding, to the data fields and questions within the form being customised to suit the firm's requirements. By adding the Online Will Planner to GloverPriest's website, they have been able to dramatically reduce the cost of having to go to a third-party wills software provider and cut the usual time taken to start the wills process, not only for the client but also the firm itself. Thus, leaving more time for fee earners to get on with other urgent matters without compromising the quality of the service given to clients.



GloverPriest have a long-standing history of providing excellent legal protection for their clients, with their oldest office in Tamworth being traced back to 1749. Since then, the firm has seen great growth, as they now have eight offices operating in Birmingham, Staffordshire and Northampton. The firm pride themselves on continuously supporting the legal needs of local communities and constantly living up to their company values of being experienced, expert and personable.

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## Last Will and Testament

### Step 1 of 7 - About You

14%

Type of Will \*

Standard Mirror Will

### Your Details

Before you begin please enter your email address: \*

Enter Email

Confirm Email

Do you currently have a will?

Next

Save and Continue Later

“Working with Accesspoint over the past 2 years has ensured a seamless approach to the major developments of P4W that we have carried out, and further developments benefiting the firm, our teams and our clients. One of our biggest projects we have completed with Accesspoint was our Online Will Planner which has made the whole process of completing a simple Will online a massive success with our clients and cuts down the time lawyers are dealing with administration work. As the firm continues to grow, we will continue to work closely with Accesspoint to ensure we are at the forefront when it comes to technology.”

Ian Bury - (Sales & Marketing Manager) at GloverPriest