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Working workflows

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As everyone knows, conveyancing is an area of legal work under immense pressure. Margins are squeezed by non-local providers offering low cost remote conveyancing, while the stakes are high from a risk and compliance angle due to rising indemnity premiums. The rising solution we've seen in the legal industry seems to lie in automation and efficiency savings through better use of technology – which leads us to wonder, as firms and their chosen suppliers have been implementing conveyancing case management systems (CMS) for over two decades, why do so many firms struggle with these projects and why are the results so mixed?

Most of the CMSs integrated with practice management systems on the market provide a framework, or development platform, for the firm to create a customised case workflow for each work type. This involves the firm designing the scope and specifications for the workflow and then programming that into the CMS. Even those with 'out of the box' workflows require a great deal of set up and configuration. An average of a nine to 12-month timescale for the delivery of conveyancing workflow projects are not unheard of!

However, most firms fail at the initial stage – striving to create 'catch all' processes resulting in lengthy and overly complicated flows or failing to assign the right levels of resource to the project. Additionally, programmers will work by the specifications laid out in the design and flow documents – they don't understand the user practicalities or legal implications of a process. A fatal mistake made by firms implementing a new system is that end users, such as fee earners and secretaries, are usually left out of the process. Often, they're suddenly provided a completely different way of working and forced to comply for the benefit of the firm. Is there any wonder that the firm faces resistance and complaints from users that the system is slowing them down?

SME firms that can't afford to make the

mistakes their larger competitors have made. They must step back and assess not only the type of automation they have in place (if any), but also their workflow method to ensure it's successful.

There are effective CMSs and workflows available in the market that can provide an efficient, easy-to-use solution by automating mundane tasks such as the generation of standard correspondence, and integration with HMRC or Land Registry to speed up the data input requirements. You can also have prompts and reminders within a workflow to ensure that key actions or dates are not missed, mitigating the high-risk elements of this type of work.

To avoid any miscommunication, we strongly urge your firm to engage the end users in the early design process – what do they want from the system, how can it make life easier for them? Early user buy-in will result in less resistance when the workflows go live. Also, consider a phased approach to the workflows. Initial releases providing the basic stages of a complete workflow and then the later ones expanding on specific processes. This approach allows users to familiarise themselves with the system without feeling overwhelmed by a 'big bang' approach. Having used it in a real-life scenario will help when it comes to improving on the processes over time.

Lastly, keep it simple. Resist the urge to create 'catch all' processes that create too many prompts and result in lengthy processes, which end up creating inefficiency – the opposite aim of a workflow!

The future of conveyancing has been changed as the current Covid-19 environment has compounded the shift from paper-based and even email-based correspondence with conveyancing clients to more of a modern, online approach. It's therefore more important than ever that firms have a fully functioning CMS, especially those in conveyancing. SME firms can profitably survive in this marketplace, as long as they embrace the technology trends of the general populace. **LPM**



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