Regional heavyweight utilises Proclaim to drive its business forward

Goldsmith Williams Solicitors is one of the UK's leading law firms, specialising in conveyancing, remortgage road traffic accidents and wills. Based in the heart of Liverpool, the practice employs over 250 staff, is on the panel of every leading building society, bank and centralised lender, and acts for a wide network of mortgage advisers, packagers, networks and accident claims companies.

In 2003, the firm implemented Eclipse's Proclaim solution for its case management and practice accounting needs. Head of IT, James Barron (pictured), talks us through the firm's experience and ongoing use of Proclaim.

Why did you choose Eclipse and Proclaim?
Back in 2003, Goldsmith Williams was experiencing serious growth in our 'volume' services, particularly conveyancing and remortgage. We decided that the time was right to look at robust IT solutions that would scale up with our ambitious plans. We brought in a panel of suppliers, and the decision was made to implement Proclaim – initially alongside our existing case management and accounts systems.

Proclaim stood out as being both resilient and incredibly flexible. Although delivered as an 'off-the-shelf' system, the inclusive toolkits meant that we could tailor and develop the software to a practically unlimited degree, and it was this that really swung it for us!

After 18 months we had migrated all of our separate business units and case loads from the incumbent systems over to Proclaim.

What day-to-day benefits do you see from the system?
For me, the overwhelming strength of the system is its flexibility, and the ease and speed with which we can adapt it to our ongoing needs. Legal software is generally – in my experience – very rigid and (at best!) difficult to amend. Our team can, at a moment's notice, tailor pretty much any element should an urgent need arise. Users then pick up these changes the next time they log into the system. Screen appearance, data fields, workflow steps, documents, reports… everything can be modified in-house meaning that we can adapt to anything a client, legislation, or market situation throws at us.

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How have you tailored Proclaim in line with your overall business development strategy?

We have an IT team here that is responsible for both routine administration and global strategic system management. We've become highly proficient, and are able to manage every element of Proclaim internally, with no need to recourse to Eclipse (although the firm has always been swift to react when called upon!). This makes us extremely fluid and reactive, and of course means that our ongoing system cost is kept low.

This works extremely well when, for example, we have a referrer who insists upon cases being managed in a particular way. Workflow steps can be created and tweaked in line with any number of processes. If that referrer wants an automated status report every Monday at 8am, no problem. Similarly, if they need all communication to be in email format except in stipulated circumstances, then again – no problem.

In addition, we have used Eclipse's 'FileView' system to create GWLive, an online portal which enables our clients and referrers to access case status via a secure connection. GWLive is a fantastic addition to our marketing portfolio, as the data produced is real-time, 100% secure, and extremely flexible in terms of what we can display. If a referrer wants to see every scrap of information pertaining to their cases (including documents), then we can provide that. If a simple 'milestone' view is all that is required, then that is available too. We've utilised Web Services to assist in the seamless transfer of data and this really sets us apart from competitors in terms of speed and data integrity.

How does Proclaim help in linking you with business partners?

FTP import / export routines are extensively used to integrate with other Proclaim users, for example our accident management referrers. Case data can be instantaneously shared back and forth between us and our partners, creating extremely strong relationships; vital in markets such as personal injury.

Do you have any future plans that you'd like to share?

At present, for advanced reporting, we transfer some data from Proclaim into a SQL Server environment, using Eclipse's 'Dynamic Database' tool. This enables us to extract and manipulate data away from a 'live' case environment if we wish, to ensure complete integrity. We have developed a specialised 'Reporting Console' application which makes key information accessible to appropriate internal users via our Intranet.

Eclipse is very soon to release its own 'SQL Data Warehouse' tool which will streamline this extraction and publishing process, and enable us to speed up our reporting and data manipulation. We intend to utilise this heavily, as Goldsmith Williams relies strongly on accurate MI and trend reporting to enable us to stay ahead of the market and tailor our offerings accordingly.

Eclipse's Data Warehouse tool will be made available as part of the next Proclaim version upgrade, and it is this constant 'value adding' by Eclipse which helps to maintain such a strong supplier / client relationship.

In short, Proclaim is utterly vital to us as a complete business tool, and we look forward to the system expanding with us as we continue to grow!

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