

## Merging with success

### When two firms become one, it's an opportunity to make one IT system for the new firm that builds on the best parts of each merging business

#### *Leading on change, not reacting to its effects*

One of the opportunities of a law firm merger is that it's a chance to upgrade practice management systems, to match the best parts of each merging firm and the vision of the new business.

This might sound like spin – after all, binding two firms' systems or data together is often the pain behind a merger's strategic pleasure. But in the case of Wilkin Chapman Grange, a merger has allowed technology to deliver significantly more value to the firm.

Implementing a totally new practice management system (PMS) in just three months to back a strategic merger of 350 staff in 11 offices takes determination and courage. That's just what Julia Whittaker, partner and chief executive at Wilkin Chapman Grange, did – because she knew that the benefits of doing it would be significant. "I wanted to seize the opportunity to update, upgrade, improve and future-proof our IT systems," she says.

Wilkin Chapman Grange's attitude to technology matches the merger in being about strategic decisions – leading on change, not just dealing with its effects. "We're different because we're using technology in a proactive and strategic way to help make us more effective, deliver better client services and value for money – and ultimately improve profitability," Whittaker explains. "It's central to our culture."

#### *Strategic mergers need strategic solutions*

Choosing a new PMS solution, and its supplier, was a strategic decision for Wilkin Chapman, pre-merger, and one that involved all areas of the business. "We wanted to make the right decision, with the needs of two firms going forward as one top of our minds," Whittaker says.

But the merger also presented her with the classic 'two become one' dilemma: the other merging firm, Grange Wintringham, was technically advanced in some ways, but not in others.

Whittaker's new case management tool, for example, needed to be excellent because an existing specialist property area within Grange Wintringham was already using something like it. In contrast, online billing, requisitions and matter history capabilities were used at Wilkin Chapman, but were new for Grange Wintringham – which presented "a significant training challenge".

Online billing is now a central feature of the merged firm's capability, because Whittaker and the change team knew how much it can deliver to the bottom line. "We know that profitability is certainly improved from the use of online billing, so we needed the new system to work from day one, for everyone."

#### *Applying business intelligence to the everyday*

Whittaker also backs business intelligence as a way to bring huge value to the business – in Wilkin Chapman Grange's case, through Linetime's Business Intelligence module. The firm has been using key performance indicators for some time, she says, but fee-earners in the new firm now have daily 'dashboard' views of how they are doing against their KPIs, using data pulled from the PMS and processed by the BI module.

This business insight helps practice teams stay on track with work goals, she says, because "there are no big surprises, and management has a view of progress across the firm, offices and departments".

"Now that we have instant information, our visibility of the business is so much better and, crucially, more timely.

"It's a transparent system and it has raised the significance and meaning of KPIs in people's minds. Everybody uses it, down to our post A-level intake, and it's made us all much more proactive. How much work are we doing? Where are the bad debts, and how can we resolve them? What are we doing right? How are we going to reach our target? It's a very dynamic way of working and measuring."

Fee-earners have responded well to the new methodology, Whittaker says. "At Wilkin Chapman Grange, people are part of setting their own targets, so they want to succeed and know how they're doing. Now they can proactively judge their performance and contribution on a daily basis. Our lawyers understand that technology can help them do a better job and they embrace it – we've found it to be an empowering and motivational tool."

### *One merged firm needs one, consolidated database*

Technically, a big driver for the firm to choose Linetime was that its solutions are based on a single database for all information. This centralised set-up creates a sound base for the BI module to mine the firm's data, and it allows a merging business to create, from the outset, the right information platform on which to build. It also enables the implementation of a sound, single user interface for all staff and systems.

"It sounds simple, but having all our information in one place has to be one of the biggest benefits, especially coming through a merger," she explains. The data migration was a "huge job", she says – a challenge anyone going through such a change should be aware of. But Linetime and the firm achieved the switch within a three-month timeframe, and now, Whittaker says, "getting to information is very straightforward".

"Email is stored in a proper way – it's easy to put notes on a matter, so they get put on. It's now much easier for lawyers to make sure a client is properly informed about their case."

### *Using technology to make commoditised work profitable*

Case management isn't usually where a law firm finds deep competitiveness, but for the more commoditised work in a firm, good case management means workflow – which equates to efficiency and competitiveness.

Linetime's Legal Case Management was rolled out at Wilkin Chapman Grange to all domestic property fee-earners at first, and the firm has been extending its use further ever since.

Whittaker says her experience of the CMS has been "excellent", mainly because of the workflow benefits that such a system provides. "Simple things like letters being automatically created on an event-driven basis means we can be much more competitive in this commoditised area of law," she says. The firm is now rolling the CMS out within the personal injury practice, which, Whittaker says, will make the business "so much more productive".

Whittaker says that the Legal Services Act, fully in force from October 2011, provides a big incentive to using technology to help firms to drive costs down. "With commoditised legal services, such as domestic property, PI and debt recovery, IT systems are the way to help make us more efficient and to minimise cost. And this efficiency is also a win for our clients."

### *Creating client-facing systems to deliver customer value*

The other side to being more efficient for clients in an increasingly competitive legal market is connecting more directly with them. Wilkin Chapman Grange now uses Linetime's B2C-Online Case Tracking module to give clients the ability to check on matter progress at any time, using a web browser. "It removes a great deal of client frustration," Whittaker says. "Reporting is easier and our fixed-fee services, which are becoming more popular, can be delivered more effectively using online case tracking, which also ultimately improves the margin on those services."

Everyone knows it's hard to nail down a bottom-line benefit to installing a PMS but, Whittaker says, rolling out a firm-wide solution that goes far beyond case management, with a single database, is delivering real value. "It's definitely delivering value for money, because the benefits don't stop. As we proceed, we'll get more and more value through expanding case management into PI and working towards digital dictation linked to the system, for example.

"But it's our relationship with Linetime that helps us create more and more value from the system. We will continue to develop the use of Linetime's solutions further into advice-based practice areas, helping to make our processes as efficient as possible and enabling our people to be as effective as they can be."

### *The benefits of strategic IT partnerships*

Whittaker knows that, just because Wilkin Chapman Grange has made Linetime work for them from the start, it's still vital to stay innovative. "Our productivity has been greatly enhanced, but we will always want and need to do more. We are very forward-looking."

But, she says, having a flexible IT partner is the key to being innovative. Wilkin Chapman Grange's relationship with Linetime is now invaluable to the business, she explains – because the firm has created a strategic partnership with its IT supplier, which has benefits far beyond just buying solutions.

"How Linetime works with us to take advantage of the opportunities as part of our business strategy provides the real edge. What we need isn't necessarily in the standard product, but they deliver what we need. This provides a mutual advantage – they deliver on our ideas and they also use our needs to improve their products. I like to think they have benefited from working with us."

Making strategic IT investments should always be about creating a more efficient, effective and competitive law firm – and this is what Wilkin Chapman Grange has achieved, by binding its strategic vision on IT to its vision for the firm as a whole. As Whittaker says: "I'm not a fan of doing things piecemeal; I knew we needed one system, for all 350 people in the new firm."