

## Getting closer to clients – connecting case management and client collaboration

**How top-200 firm Flint Bishop LLP is using case management technology to empower its clients with easy and useful access to their data – and is delivering their work in a more efficient, more cost-effective way.**

For a law firm to be really client-focused, it needs to work collaboratively with clients, providing the information they need to them, when they need it. But if those clients want great value for money, and the work is high-volume/low-margin, a firm needs IT systems that can deliver the work in the most cost-efficient, process-oriented way.

Flint Bishop, a 180-person firm in the East Midlands, is using case management technology to deliver on both these needs. The firm's strategy is to be fully client-centric – its motto is 'putting you first'. To prove this point, Flint Bishop asks every team member of its licensing team to gain a National Certificate for Personal Licence Holders – the qualification required to apply for a personal licence for the sale of alcohol.

This 'extra mile' behaviour, says Andrew Cochrane, partner and head of commercial dispute resolution at Flint Bishop, shows clients that the firm is really trying to understand and empathise with the pressures its clients face.

But Flint Bishop needed to do more than this if it wanted to demonstrate client commitment as the market gets even more competitive – it needed to give clients more of their information back, when they wanted it. To do this, it took on Linetime's Liberate SE case management system (CMS) and B2C Online Case Tracking to deliver more transparency on matters to its clients – and more workflow and matter automation for the firm.

### Delivering transparency and value with client-facing IT

The licensing team at Flint Bishop acts for some large pub and hotel chains, organisations like Marstons, Scottish and Newcastle and Kew Green Hotels, each of which might have as many as 1,500 licensed premises. Licensing clients want easy and rapid access to information – such as licence information for premises when they need to review licences or understand any issues that come up.

This used to be a fairly time-consuming process, including a string of phone calls, emails and faxes. But using workflow-oriented practice management technology alongside a customer-facing information portal has changed all that.

As Cochrane explains: "It's essential to provide an extra level of service to our clients. Operating in an increasingly competitive market means that we constantly have to innovate to ensure that we have a significant edge over our competitors. Linetime's [client-side functionality] has been very well received by clients, who immediately recognised the value it brings to them."

Online Case Tracking now provides Flint Bishop licensing clients with an 'extranet' facility, providing quick and easy access to all the documents, information and correspondence related to each and every licence.

Tony Bateman, licensing manager at Flint Bishop, says clients need this information, and being able to provide it to them makes a big difference in their lives. "A licence changes every time a new tenant takes over a pub or restaurant. It's very important for a client to be able to access the original licence to make changes so the new licence can be processed." Flint Bishop's clients can now gain access to all case histories in just a few mouse clicks.

Alongside delivering data to the client, Flint Bishop can tailor B2C Online Case Tracking to meet any client's specific needs. For example, Bateman says the firm wanted to show clients it was going the extra mile with IT, so it asked them if they had any specific requirements when setting them up on B2C – and they did.

"One client particularly wanted to be able to see which geographic regions their premises were in, and it was easy to provide that facility for them," says Bateman.

Liberate SE and B2C provides a significantly increased level of information sharing and transparency between client and firm – which, Cochrane says, "builds trust – which is good for both parties".

### **Using workflow and process-oriented IT to deliver efficiency**

But, inside the firm, driving efficiency and improving productivity is vital to making sure Flint Bishop can deliver the work, and this extra level of value, on-budget. Licensing is a fairly commoditised business – it's a set of known processes, not brand new law each time – so Flint Bishop needs to demonstrate more value while doing the work to a budget that's as tight as a bow.

Liberate SE now drives improved workflow and increased efficiencies in the firm. As Bateman explains, "the nature of the licensing team's work means high volumes of both licence applications and renewals – but automating workflows can have a significant impact on day-to-day productivity, and it saves costs".

Applying for a new licence, for example, or a change to an existing licence generates a large volume of correspondence and forms, but the margin on such a transaction might be small. Liberate SE can generate and populate the correct forms and enable the firm to tightly manage the resulting workflow, keeping the processing costs to a minimum and maximising margin.

Each licensing team member has a 'work box' that guides them through tasks specific to the case they're working on, and automatically generates all necessary documentation. This is a huge advantage in both costs and efficiency, says Bateman. "It reduces the admin, and the application process is faster and more efficient – and we can provide our clients with a superior service," he says.

### **Leveraging IT capability to win new client business**

Bateman's colleague Cochrane says the firm is always looking to the future when it comes to providing "that extra level of service to clients" – but the firm wants to go even further. Cochrane wants to develop a 'red flag' system with Liberate SE that would highlight any potential issues with clients' premises, to help them solve problems before they escalate.

"We can help our clients recognise and deal with issues quickly and efficiently. It's about Flint Bishop giving that little bit of extra value to our clients," Cochrane says.

Using technology, Flint Bishop can be ahead of its clients, anticipating their needs. "We know it's key to be able to use technology to give us a competitive advantage," Cochrane says. "Linetime provides complete transparency for our clients and an improved client service, as well as increased efficiency and cost savings for us. I can see that it's really going to give us an advantage when pitching for new business."

In fact, Linetime technology is already helping Flint Bishop win new business. Cochrane says the firm won recent business precisely because a "system that provides online access to their client information was central to the client's requirements. We were able to show them what Linetime can do, and they were very impressed. I know it helped us win the business, and I'm confident that being able to talk about how we use Linetime technology to provide an improved level of client service will be significant in winning future business."