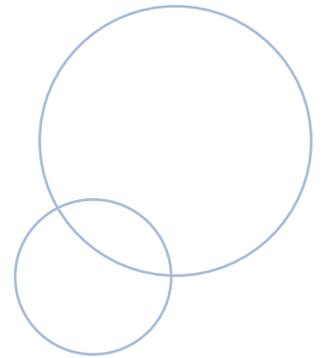




Case study

How GT Stewart used Tikit FormShare automation and P4W to radically restructure police station client inception and make criminal law financially viable



GT Stewart needed:

- A way to drastically lower the costs of police station client inception in order to increase the financial viability of giving criminal law clients access to justice

GT Stewart gained:

- A Tikit Formshare form which is used to collect client data at police stations
- Automation of the administrative processes of client on-boarding within P4W
- Enhanced data security, accuracy, completeness and compliance
- An average 35 minute time-saving per on-boarded client, equating 1,166 hours saved or around 7 months' worth of administrative time annually

Background

GT Stewart was set up in 2003 by a group of lawyers who wanted to fight for clients irrespective of their ability to pay. Today's firm has 175 staff across a national network of offices. It has been nominated and shortlisted for many legal awards and is recommended in the leading legal directories, Chambers UK and the Legal 500.

From the outset, the firm recognised that the climate for publicly funded work was increasingly adverse. By 2018, it had withstood a decade's worth of Legal Aid fee cuts, but to continue in its mission to practice criminal defence law – an area of practice which makes a loss the vast majority of the time – the firm had to find a way to radically cut costs.

An opportunity to do so was presented by Tikit's FormShare software. GT Stewart had participated in a Tikit P4W User Group initiative in which 14 firms had pooled their resources to each develop a form they needed using FormShare. This showed GT Stewart what could be achieved, so in June 2018 work began in earnest on progressing an automated police station on-boarding form.

The challenge

An automated form could make a huge difference because it took a lot of administration to on-board criminal law clients. The process was messy, time-consuming and therefore costly, starting with manual form-filling at a police station, followed by the manual keying of information into the firm's database once a physical form was back at the office. As admin personnel struggled to decipher the handwriting of

others, it was error-prone. As pieces of paper piled up, it was insecure. And since the information might be incomplete, there was every chance of further delay which could negatively impact on client experience.

This was even before the data could be used to manually start creating new client and matter files. This process also had a big impact on the client's access to justice because data gathered at the police station is used not just for inception, but also for the client's defence in the hours, days and months to follow.

GT Stewart's challenge was to use Tikit FormShare software to streamline and automate as much of the work as possible in order to reduce costs and improve data quality and security. Simultaneously they wanted to create a process so simple, compliant and secure that even the most technophobic lawyer would instantly see the benefits and adopt it.

The innovation

A project team was convened under the direction of GT Stewart's Practice Director, Melanie Krudy. Expert advice on project and change management was also contracted in. GT Stewart's start point was the inherited prototype form created by the Tikit P4W User Group initiative. The project team's first task was to look at this form and decide how far they wanted to take it. The decision was that they would develop a solution which would achieve the maximum possible process automation.

Harri Clement, Practice Supervisor at GT Stewart, was responsible for the technical realisation of the form, for testing it and for ensuring it worked on the operational level both with clients and in-situ at police stations for lawyers and other firm representatives.

The project made good progress and by November 2018 the solution was soft-launched in one GT Stewart office. Work was initiated on change management to ensure the new system was widely adopted, and the firm invested in new, light-weight laptops to support its implementation. Training webinars were conducted in January 2019 and on 21 January the new system went live nationally across all 11 of the firm's UK offices.

The outcome

Now a digital form, held on a laptop, is completed at police stations. This carefully structured, nine-page form ensures that data collection is accurate, complete and efficient, plus a time record is created. Information can be captured off- or online and is instantly encrypted. Once submitted electronically to the firm it goes directly into the firm's P4W practice management system where the software

instantaneously:

- Checks for conflicts
- Executes a compliance check
- Where required, opens a new client record
- Opens a new client file
- Time records the complex legal aid time and fixed fees

Stage 2 of the project has streamlined the client care and advice documentation generated from data captured in the form. This also initiates the automated billing process. A court advocacy form was also rolled out in May 2019 with similar functionality.

The impact

This is the first project of its type to use Tikit FormShare nationally to export police station data directly into the firm's practice management system and automate processes therein. This innovation slashes the administrative overhead and is having a profound impact on GT Stewart's operational efficiency:

- The accuracy and completeness of data is improved
- GDPR compliance is built-in
- 35 minutes are saved per on-boarded client and 2,000 police station clients were on-boarded in 2018. This suggests a total annual saving of 1,166 hours, the equivalent of 166 days, or roughly 7 months' work
- The new software is having such a big impact that the firm had to undergo some restructuring to redeploy client on-boarding staff on higher value activities

In addition, since adopting the technology, GT Stewart has expanded its use to include new client inception across civil law. It means that FormShare is used for the majority of on-boarding whether the firm takes on the client or not. The system can then generate valuable information on reasons why any cases are not taken on as well as monitoring the speed of conversion. FormShare is providing far more transparency of the whole process while the data collected on prospective clients is handled in compliance with GDPR. GT Stewart has also shared the technology with other firms, enabling them to develop it quickly without going down the same development pathway.

Most importantly of all, however, is that the extent of cost cutting achieved by the introduction of the Tikit

FormShare forms has been nothing short of mission critical for GT Stewart. By embracing this technology, at a time when other firms are contracting their criminal law practices or closing them down, GT Stewart has actually been able to expand through a merger with FMW Law. In essence, the automation of police station on-boarding, advocacy and case management using Tikit FileShare and P4W has enabled the continued practice of criminal law to become economically viable for the firm.

"With the pressure and compliance issues, I am now sold on automation playing a key role in the delivery of access to justice. If I can use the form anyone can.

I am particularly impressed with the ability to automatically input all the information, especially the disbursements, which when done manually were forever incorrect. I can now email FormShare at 2am for my colleagues who attend Court hours later and they have legible client instructions and disclosure. Before FormShare I would either have to scan them over the notes after getting into the office early or speak to them on the phone."

-Len Hodkin, Solicitor, GT Stewart

Firm snapshot

GT Stewart was set up in 2003 by a group of lawyers committed to fighting for clients whether they could pay privately or needed legal aid. They could see that the climate was changing both for the law and publicly funded work. Law firms would need to change with the times to survive.

Central to this was going to be well trained adaptable lawyers who had the skills and tenacity to withstand a greater antipathy to those who represented people accused of crime generally and especially if it was funded at the public's expense.

They focused on advocacy throughout the case and continuity of representation and developed IT and case management systems to stay ahead of their competitors.

Today the firm has over 175 staff across a national network of offices. It has been nominated and shortlisted for many legal awards. It is proud to be recommended in the leading legal directories – Chambers UK and the Legal 500.

Why Tikit?

Knowledge. Unparalleled knowledge of practice and case management within the legal industry.

Investment. Backed by a FTSE 100 company, we have the resources to continually invest in the development of our practice and case management solution.

Experience. We have accumulated unrivalled experience in practice and case management and a proven track record of its deployment in a firm environment.

Support. Tikit P4W is backed by an ISO9001 certified support service that is available 24 x 7.

To find out more, talk to a member of the Tikit team today.

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