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LPM

LEGAL PRACTICE MANAGEMENT

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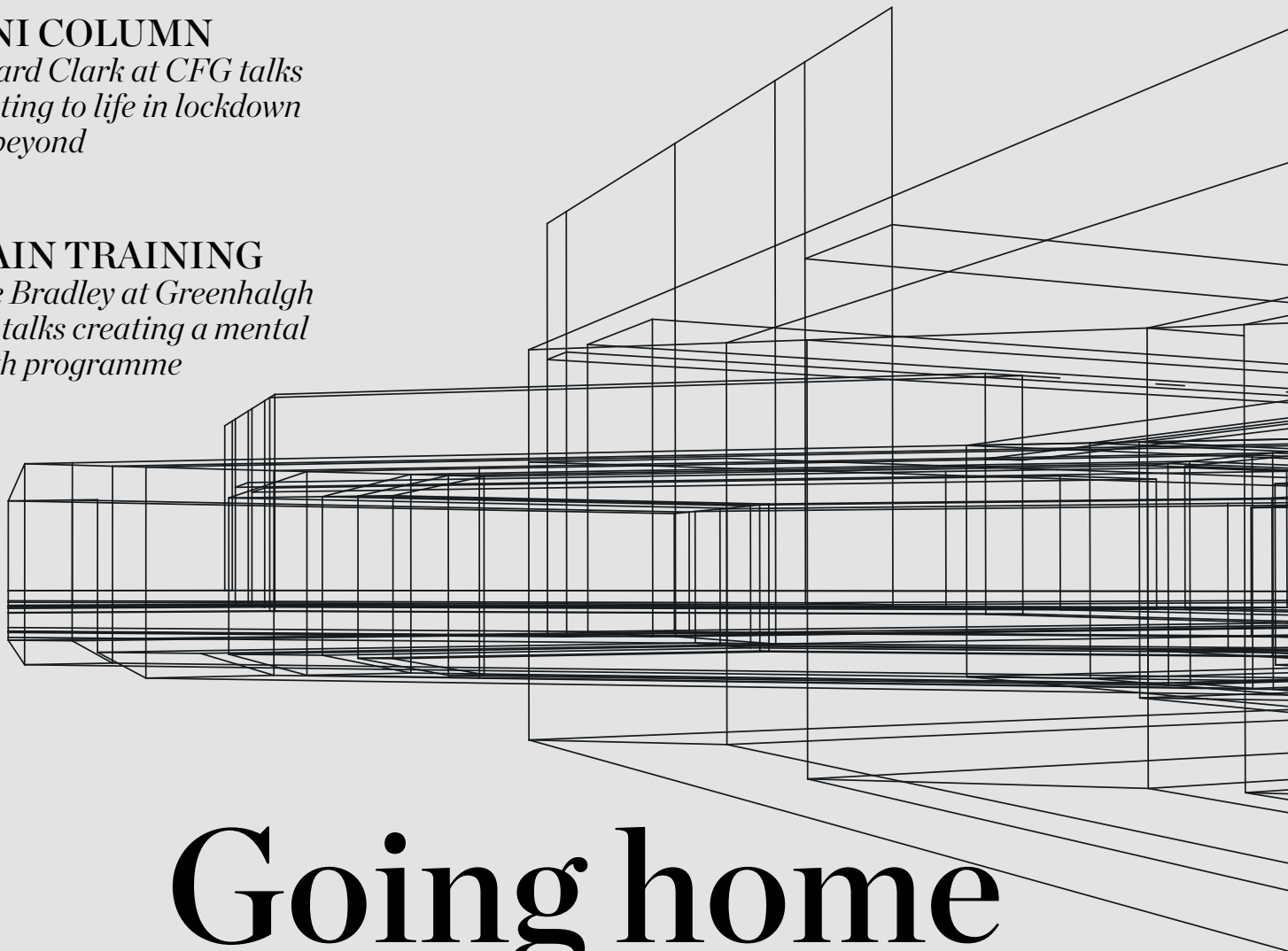
EXPERT
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MINI COLUMN

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and beyond*

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Kerr talks creating a mental
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Going home

*LPM takes a building inspection of the conveyancing practice area - what
can other areas learn about its fittings?*



COMPLETE CONTROL

Stephen Luke, director and partner at Instalaw, says Insight Legal was crucial to the firm's growth and success

For a niche prison law firm with a strategy to expand its offering and deliver quality services to its clients, having the technological capability to do so unhindered by location or change is vital.

Stephen Luke, director and partner at Instalaw says: "I don't think we would have been able to expand as much as we have without the use of Insight Legal.

"And being a director in these times, when everyone is working from home, I need to make sure that everything is done properly and efficiently. Insight Legal has been second to none and has helped us to make that transition flawlessly."

DOCUMENTS READY

Luke says right from the very beginning Instalaw knew it would need a one-stop shop system. "It was important for us that we could easily access client data remotely, no matter where we were in the country."

Instalaw currently has two offices – one in Nottingham and another in Staffordshire – and with a few consultants who work for the firm scattered nationwide, it needed a system with a high degree of flexibility.

"It's been a blessing during these unprecedented times because anyone can easily manage their caseload – take their laptop home, open it up and use Insight as if they were sat in the office. And, of course, it's crucial that we can store all of our clients' data securely."

Insight Legal offers an easy-to-use file management system that could be added to and adapted as the firm grew – this was a big thing for Instalaw.

And the system is backed up regularly, so the firm is never in a position where staff can't access client documents, no matter what else

Being a director in these times, when everyone is working from home, I need to make sure that everything is done properly and efficiently. Insight Legal has been second to none and has helped us to make that transition flawlessly

Stephen Luke, director and partner, Instalaw

happens. Luke says it's important to have plans in place should there be a flood or fire (or pandemic) – and with Insight Legal, Instalaw can still continue a client's case without any detriment to them at all.

The most important feature for the firm is document production. "We have very strict requirements for our clients," Luke points out.

He says the document production tab within each client's folder enables the firm to automatically fill in client details – name, address, date of birth, and matter information – at the click of a button.

"We have a large number of clients each year and some might have many different matters with us. Using Insight Legal means fee earners can concentrate more on the legal work side of things rather than admin. It also allows us to export key data from the system into the firm's Outlook folder."

Time recording also gets processed directly into the system. "A court application, for example, may take two hours to draft. Insight

LPM FIRM FACTS

Instalaw

Revenue: £1.5m

Corporate status: Ltd

18 fee earners, 26 total staff

Offices: Newcastle-under-Lyme, Nottingham



Having a mobile app saves time and it's convenient if we're out of the office on the move and need to quickly access client information

Stephen Luke, director and partner, Instalaw

Legal will time that application and appropriately record that time into the sections we've set up in the system."

If someone needs a disbursement on a case, then there's an option in Insight Legal to record that as well. "A fee earner can fill out reasons for the disbursement, and then I get a notification, which I can then log into and either authorise or decline. This in turn goes directly onto the client's ledger."

And when the file comes to a conclusion, he says, we can see all the time that's been calculated, documentation and any disbursements that need to be billed, which is all saved in the client's folder.

Luke can also see all the financial information – profit-and-loss breakdown, outstanding bills, and so on. "From my management perspective, it's great. It also allows me to easily add and remove users of the system, increase or restrict permissions, create fee earner reports and so on. It's a great company tool as well as being a great help to our client database."

ON A PERSONAL LEVEL

Luke says working with Insight Legal feels more like a personal relationship than a business one. "Insight Legal will work with us to make sure the system suits our needs as the firm develops and grows."

Instalaw has seen some recognition for its strategy and people in recent years – and during an awards ceremony, Luke says Insight was there and celebrated with the firm, as part of the firm.

"I can call them up if there's an issue or query and they will deal with it straight away, which I really like as I don't have to wait for a call back," he adds.

A piece of functionality the firm added later was the ability to automatically put key dates into an Outlook folder. Luke says: "It just made sense to be able to link that to our Insight system. After speaking with Insight Legal, they did that within a matter of hours.

"Another great thing around communication is the newsletters that Insight send us, which will include any updates that may be coming or anything that we could benefit from."

One such update the firm has taken advantage of is Insight Legal's new integrated mobile app. Luke says the firm continually reviews its use of the system to see how it can get the most out of the software. "Having a mobile app saves time and it's convenient if we're out of the office on the move and need to quickly access client information."

Cost is obviously very important. He says when Instalaw first started out, it needed a system that was affordable. Insight Legal is billed on a monthly basis, based on how many users you have.

And, he points out, it's not a difficult system where you need a dedicated IT person to run it all the time.

Luke says: "I must say, in the five years that we've used the system, we've never had a significant problem at all. It all just works flawlessly." **LPM**

ABOUT US

Insight Legal is a modern system for today's legal practices - unencumbered by legacy technology and thinking.

www.insightlegal.co.uk

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SOFTWARE