



## Accelerators as Foundation for Conveyancing Business to Deliver the Best Possible Client Service

**Lexis® Visualfiles™**  
Accelerators

### Poole Alcock Case Study

Industry: Legal | Product: Lexis® Visualfiles™

*“...Visualfiles will greatly improve the profitability of the transactions we manage annually; as well as enhancing service delivery for clients and third parties.”*

Stacey Parkin, Operations Manager, Poole Alcock LLP

Based in Cheshire, Poole Alcock LLP provides a wide range of legal services for business and private clients. Commercial and Residential property are key offerings of the firm with its customers including property owners and developers, professional landlords and businesses with extensive property assets. The firm also offers a full range of consumer services, including family law, personal injury, civil litigation and wills and probate.

Poole Alcock selected the legal workflow and case management system, Lexis® Visualfiles™ to optimise its conveyancing services, and worked with LexisNexis and key hosting partner, Converge TS, to implement the new Lexis Conveyancing Accelerators as a cloud-based solution. Stacey Parkin, Operations Manager at Poole Alcock LLP, talks to LexisNexis Enterprise Solutions about the benefits Visualfiles is delivering to the firm and how she expects the solution to evolve in the future.



Enterprise Solutions



## What was Poole Alcock's key driver for implementing Lexis Visualfiles?

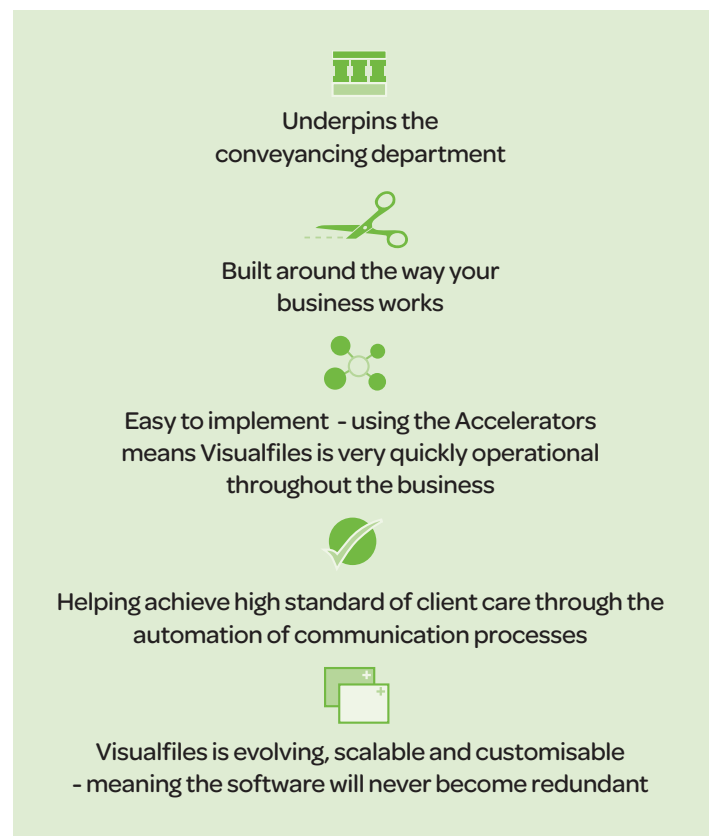
**Stacey Parkin:** Our conveyancing business has grown significantly in the last 12 months. We have some of the best people in the industry working for us, all of whom are really passionate about providing an excellent service to our clients and referrers of work. The firm realised that a more intuitive and process driven case management system was needed to take the administrative burden from our conveyancers and to allow them more time to spend speaking with clients and estate agents. Finding a case management system that could be tailored to our conveyancing methodology was crucial, as one of our key drivers for implementing Visualfiles was to ensure that our staff are well supported and feel confident in the way they conduct their day to day activities. Staff productivity is very much reflected in the service delivered to customers, which in turn defines clients' experience of working with Poole Alcock.

## How easy was Visualfiles to deploy?

**Stacey Parkin:** LexisNexis is introducing new best practice "Accelerators" that allow organisations to be up and running with specific Visualfiles solutions quickly. We have used the Conveyancing Accelerators as our foundation and it got us speedily operational on the Visualfiles platform. Today, we have all the core functionalities and automated workflows to run an efficient conveyancing service without having to alter our processes. Visualfiles has been built around the way we work. We wouldn't have been able to achieve this with some of the other products on the market.

We already work with one of LexisNexis' key partners, the hosting and cloud expert, Converge Technology Specialists. The company's hosted service enabled a fast and efficient deployment of Visualfiles, provides a secure and compliant solution and eliminates the need for any large capital expenditure for additional servers to accommodate Visualfiles. We simply scaled our hosted capacity and paid for the additional server usage.

With the Conveyancing Accelerators as our foundation, we are now in a position to make ongoing process improvements in Visualfiles, embed automation and devise new ways of working to turn the practice into an even more efficient and profitable business operation.





## Please give examples of any new processes you have developed.

**Stacey Parkin:** Prior to implementing Visualfiles, many manual processes put a time burden on our conveyancing teams when it came to efficiently managing their caseloads. It was restricting the growth of our profitability. We have now standardised and automated key administrative processes like client care paperwork, file opening and closing and search initiation – all of which are important, but time intensive.

Following training, making amendments in Visualfiles is simple, and we regularly make changes to fine-tune our processes – without any further assistance from LexisNexis Enterprise Solutions.

## Do you have a formal process of measuring the success of Visualfiles at the firm?

**Stacey Parkin:** Given that our key driver for implementing Visualfiles was to support staff, the most important metric is user satisfaction. We will regularly conduct user satisfaction surveys to gather feedback on how well the technology is serving them and where improvements need to be made. We are looking for a satisfaction rating of at least 80 percent.

We will measure the number of matters closed and new ones opened in Visualfiles, as well as measuring 'time to completion' on transactions. A short time to completion equates to client satisfaction, referral partner satisfaction and an increase in profit for Poole Alcock. The automation of conveyancing processes will aid the achievement of shorter time to completion timescales.

## Please could you elaborate on the impact of Visualfiles on customer satisfaction?

**Stacey Parkin:** Absolutely. We have a very stringent definition of what constitutes a complaint. To us a complaint is any expression of dissatisfaction and it doesn't have to be a formal grievance. For instance, a client enquiring about the same issue more than once due to a lack of response from a case worker, is a reflection of displeasure. A client not receiving an update via email in a timely manner is unacceptable. Our aim is to keep the number of expressions of dissatisfaction to less than five in any one month. Visualfiles is helping us achieve this high standard of client care through the automation of communication processes and communication 'task' generation to ensure that clients are proactively updated at every stage in the process.

*"Visualfiles is helping us achieve this high standard of client care... to ensure that clients are proactively updated at every stage in the process."*

Stacey Parkin, Operations Manager, Poole Alcock LLP



## Has Visualfiles encouraged any changes in business practices at the firm?

**Stacey Parkin:** Overall, the drive for efficiency underlies our approach to business. We are confident that Visualfiles will greatly improve the profitability of the transactions we manage annually; as well as enhancing service delivery for clients and third parties.

Visualfiles and the cloud model delivered by Converge Technology Specialists, provides much greater flexibility in the way that our employees work, and they are as just as effective remotely, as they are when in the office.

It is vital that we have a robust and resilient system in place, and our cloud-based desktop solution means that we have disaster recovery and business continuity built in. This is especially important given the recent growth in cybercrime. A cyber security breach, especially cryptolocker, can have a devastating effect on a firm, causing significant downtime and impacting its reputation and profitability. It is reassuring to know that our cloud solution provides us with better protection against potential threats and that, in the event of an attack, we have a comprehensive business continuity plan in place to make sure Poole Alcock can continue to deliver a great service under any circumstances.

## What role do you foresee Visualfiles playing in the future?

**Stacey Parkin:** Visualfiles is evolving, scalable and customisable, which is fantastic for our business as it means the software will never become redundant. Visualfiles has the capability to expand and grow as Poole Alcock expands and grows, which is exciting.

We have developed a great working partnership with LexisNexis Enterprise Solutions. The company's consulting team understands our business and has been by our side every step of the way – from scoping the solution through to go-live and training. We look forward to this continued collaboration.

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Stacey Parkin, Operations Manager, Poole Alcock LLP



## Contact Us >

**Lexis<sup>®</sup>Visualfiles<sup>™</sup>**

### For more information

To find out more about Visualfiles and to discuss your company's specific business requirements, please visit:  
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