



**CASE STUDY: One System to Rule Them All: Clyde & Co's Director of Legal Delivery and Innovation, Stephen Allen, outlines how its close collaboration with LexisNexis Enterprise Solutions helped it replace its cluttered practice management tech stack with a streamlined system tailored to meet its needs.**

***"Everything's faster, slicker, with fewer glitches... the new system has massively improved our operational efficiency."***

Over the past decade, Clyde & Co has been busy growing the business through several mergers and acquisitions – the most recent being its mergers with the UK's BLM and US insurance firm Tillman Batchelor in July 2022 and January 2025, respectively.

While these strategic moves have been instrumental in broadening Clyde & Co's capabilities in several areas of law and jurisdictions, they have also brought a myriad of individual practice and case management systems – 13 to be precise – leading to management complications and a lack of collaboration among teams. "Multiple systems meant people were working in silos – using only the tools that they were already used to – which led to limited ability for teamwork. It also caused headaches when it came to data, as we were pulling information from eight or nine databases to create client reports," explains director of legal delivery and innovation Stephen Allen.

The firm realised a new cohesive technology solution was necessary – one that would bring all the pieces together and cater to the firm's diverse needs, handling numerous matters of various complexities.

After considering a range of practice management systems (PMS) and case management systems (CMS) solutions available in the market, Clyde & Co opted

for LexisNexis Enterprise Solutions' Omni platform, with its two bespoke business management systems, Visualfiles and Everyfile. The former provides more support and automation for the more straightforward, high-volume cases, while the latter offers a higher level of customisation for complex, high-value matters.

**Lexis Omni encompasses the automation power of Lexis Visualfiles and the new knowledge and matter management solution, Lexis Everyfile.**

### **Slow and steady**

Considering the vast number of global practice areas and numerous legacy tech solutions the firm was trying to replace and consolidate, rapid widespread adoption was unlikely. Instead, Clyde & Co opted for a slow and steady, phased integration of the new systems. It began by implementing Visualfiles within the motor claims team, then gradually expanded it to other areas of liability claims work. "We initially concentrated on the high-volume, as that's where we really needed it the most. Once we

designed the generic claims system, we then created customised models — we call them pillars — for particular work and client types. We first migrated work for a single client in the motor sphere, and then gradually migrated all our volume casualty business. After that, we focused on implementing Everyfile for the complex matters, starting off with the healthcare teams,” Allen elaborates.

The implementation process took around 18 months and was officially completed on 20 January 2025 — the firm had moved approximately 40,000 cases, which encapsulates about 15.5 million documents and over half a billion data points. Currently, there are over 2000 users across both Visualfiles and Everyfile — a huge adoption uptick from the initial 10 users during the first migration.

**40,000 cases, 15.5 million documents and over half a billion data points from 13 different systems moved to one platform in 18 months.**

### The case for customisation

Unlike the traditional route of purchasing and tweaking off-the-shelf solutions, Allen says Clyde & Co and LexisNexis worked together side by side to develop the customised Everyfile platform, ensuring it ticked all the boxes — an example being the complex project management-type features that were co-designed with Clyde & Co to deliver solutions to its non-volume lawyer community. “The system has structured core competencies, but one of the reasons it’s attractive to us is that you build it to meet your requirements,” he adds.

“I’ve been speaking to LexisNexis very regularly for the last 18 months — we have weekly programme and design meetings, and the team asks our users what was good and bad about previous systems they used, what they want now, and gives suggestions if there’s an even better way of doing things. It was truly a collaborative approach.”

This close collaboration is also clear in the extensive training programme set up to ensure all users have the understanding and support to use the new system easily and efficiently. “We drip-fed information to people months before they started using it to get them prepared ahead of time, and co-developed a training course. Drop-in refresher sessions we ran after the implementation had a big impact — getting people really engaged. It shifted them away from a reluctance to try a new system, which is normal when it comes to change.”

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### The productivity prize

With the burden of using and managing 13 legacy systems now gone, Allen notes users’ speed and productivity have increased significantly. “Everything’s faster, slicker, with fewer glitches.” Take court procedures, for example. “Before, we’d have to update them on 13 different systems. Now, on Omni, we just do it once. The new system has massively improved our operational efficiency.”

The firm also particularly values Omni’s integrated document management — as Visualfiles and Everyfile have one overarching database. This makes data more accessible across the firm, thus enabling teams to extract valuable insights and produce more useful reports with much less effort. Key lawyer decisions and strategies, competitor tactics and matter outcomes are easily captured to help firms make informed business decision — these also provide a data structure that can be exploited by future AI initiatives.

With implementation now complete, the pair are moving to the next stage of collaboration — expanding and refining the use of LexisNexis Everyfile into other areas of law, such as Employment, Real-Estate, Healthcare, Abuse & Neglect, Aviation, Asbestosis in the US, and other complex work areas requiring project management-type functionality not served by traditional CMS solutions. Allen concludes: “It’s a rigorous, ongoing process, and will involve a lot of developing and testing, but ultimately you have to be pragmatic and focus on what will be the best choice for the people.”

