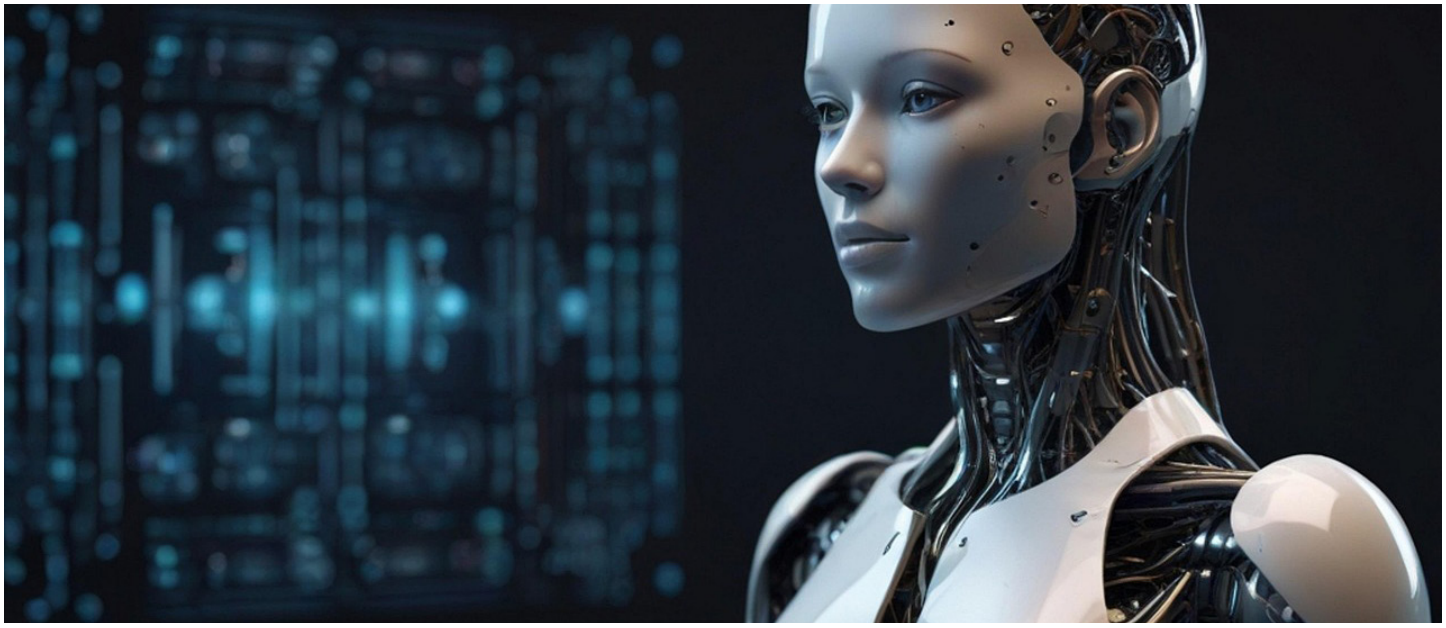

CASE STUDY: ONP's, Lexis Visualfiles Robot Army Drives Efficient, Productive, and Client-Focused Business Operation

"By the time the file has been processed through our integration system, it's in Visualfiles within just 3 to 5 minutes. By lunchtime, we've got all our files incepted, allocated, and already processing the full case details."

ONP Solicitors, part of Movera, is a modern, forward-thinking law firm, based in Stockport in the North West of England. The firm's services include conveyancing, remortgage, transfer of equity, leasehold extension, commercial, and wills and probate.

A Lexis Visualfiles user since 2002, ONP has certainly been making the most of their case management system. As the firm's primary innovation and process automation driver, ONP have used Visualfiles to enhance business efficiency and provide optimal client service as a result - a welcome solution to a challenge faced by numerous entities within the conveyancing legal industry.

Today, Lexis Visualfiles underpins the firm's entire operations across its three divisions, including re-mortgage, transaction, and private clients. With over 550 users across numerous locations, and plans in place to expand Visualfiles availability to Cardiff, ONP are leveraging technology to generate positive change, a central motivation for the firm. Indeed, a particular area where ONP are making waves with their innovative approach to automation is their adoption of the robotic process automation (RPA) capability offered by Lexis Visualfiles. The firm has significantly reduced or even eliminated human intervention for most of its repetitive and administrative processes. Case managers focus on the high-value aspects of transaction processes, delivering the best possible experience to clients across the customer journey. This means the firm can handle ever-increasing transaction volumes, supporting revenue growth.

"We've got 23 years of intellectual property built into our Visualfiles system – of which we are continuously leveraging to deliver an ever-improving service," comments Paul Simmons, Development Manager at ONP. "There is tremendous value in using the same system for the long term."

> **Lexis Visualfiles underpins the firm's entire operations across its three divisions, including re-mortgage, transaction, and private clients.**

The robot army manages complex workflows

The firm has a total of 35 robots – 14 in Lexis Visualfiles and 21 integration robots that work with third parties such as Land Registry and similar industry organisations. This powerful army of robots automates operations across the firm – from inception to closure and case exit. Note that a whopping 90% of case work is handled through a single, digital file – as opposed to a volume of files.

Case inception within minutes

The robots working on case inception are extremely busy, managing a complex workflow. They import CSV,

Continued overleaf

JSON, or XML files to systematically build each case. They begin by creating client individuals, establishing private information, and finally adding case matter details.

These files are incepted from an integration system where they're linked together cohesively. Once the case is successfully created in the Lexis Visualfiles system, the robots return a response to the third party, confirming creation and providing a reference number for future tracking.

Simmons says, "This is before a human has touched the process. The first time a case worker looks at the file is when it is in Visualfiles. The time saving is phenomenal of course, but data integrity is assured too."

Manually, incepting a file typically involves receiving an email containing client details such as name, address, date of birth, property information, and case-specific items. Someone must then key in all this information into the

A robot creates welcome packs for clients, initiating the production of all initial documentation.

system, navigating through multiple screens to complete the file inception process. This manual entry can take between five and ten minutes per file. When dealing with approximately 80 transactional files and roughly 350 remortgage files every day, the automation delivers daily time savings of approximately 36 – 72 hours across all the files processed.

Simmons adds, "By the time the file has been processed through our integration system, it's in Visualfiles within just 3 to 5 minutes. By lunchtime, we've got all our files incepted, allocated, and already processing the full case details. This efficiency allows us to immediately kick off crucial integration processes like lab work, registry submissions, and requesting office copies – all via an automated workflow, eliminating the delays inherent in manual processing."

Welcome pack creation is automatic
A robot creates welcome packs for clients, initiating the production of all initial documentation. Rather than having staff wait 30-60 seconds per document while terms of business, initial letters, and other welcome pack materials are generated, the robot handles these tasks independently. Additionally, the robots manage all integrations with HM Land Registry, request office copies, and initiate identity verification processes. The result? A largely hands-off experience for case managers, who simply validate information and activate the automated workflows as needed.

ONP's statistical analysis reveals that the firm opens or accesses remortgage cases approximately 18,000 times per day. With the robot-driven exit process, these closures happen instantly from the user's perspective, and the robot automatically handles internal reporting.

Automated case exit process routine
The robots manage the case exit process, too. As soon as the case manager has done their review, they've looked at the full case details and closed a file, the file closes instantly – as opposed to the typical 5 – 7 seconds wait while the system processes the closure. The robot gets into action, populating the relevant data in various systems and repositories for internal reporting.

ONP's statistical analysis reveals that the firm opens or accesses remortgage cases approximately 18,000 times per day. With the robot-driven exit process, these closures happen instantly from the user's perspective, and the robot automatically handles internal reporting.

Simmons confirms, "This efficiency eliminates thousands of cumulative 'waiting seconds' that would otherwise significantly impact productivity across our high-volume workflow. You only have to imagine the cost savings."

Managing the robot army
Monitoring these robots manually throughout the day is impractical. So, the firm has built a .NET solution that handles all monitoring and delivers developer alerts. All developers receive pop-up notifications when processes are running behind schedule or when volumes exceed normal thresholds. For example, one simple monitoring method for the Lexis Visualfiles robots involves frequently checking the queue size by retrieving data from the Schedule Table to determine how many items are in the robot queue.

The firm's Developer Alert system is considerably more sophisticated. The Developer Alert system provides intelligent monitoring that prevents false alarms while ensuring actual issues receive immediate attention. Since robots might legitimately be busy during peak periods, such as morning case inception (which takes approximately 2 minutes per file), queues can build up. The system is designed to distinguish between normal high-volume periods and actual system failures, only generating alerts when robots have genuinely stopped functioning.

> ***ONP has developed an advanced event system that captures multiple outputs throughout a file's lifecycle – numerous discrete data points that enable tracking of key milestones and progress stages.***

Data-driven, tech-led
The motto – "data-driven, tech-led" – underpins ONP's business. To fulfil this undertaking, the firm has established an efficient and sophisticated data system leveraging Azure and a dedicated data warehouse for comprehensive data monitoring.

Recognising that data infrastructure is only as valuable as the accuracy and timely delivery of the information it processes. ONP has developed an advanced event system that captures multiple outputs throughout a file's lifecycle – numerous discrete data points that enable tracking of key milestones and progress stages.

This granularity of system monitoring allows ONP to track specific file milestones, such as completed searches, exchanges, completions, and so forth, going up to nearly 30-35 key data points and complexity indicators. The event system serves dual purposes – it not only helps drive internal data analytics, but also enhances reporting capabilities to third parties. For instance, ONP can provide detailed status updates to partners, such as (hypothetically) 37% of files are at new instruction awaiting allocation, 14% are allocated with initial letters sent, 7% are awaiting clerk responses or questionnaires, and so on.

Flexibility to adapt to regulatory and market changes
ONP is leveraging the inherent flexibility within Lexis Visualfiles to adapt to a constantly changing regulatory environment. The stamp duty change implemented on 1st April 2025 created significant industry-wide disruption as clients rushed to complete conveyancing transactions before the deadline. ONP's automation capabilities proved critical during this period, enabling the firm to increase processing capacity to accommodate accelerated timelines.

Demonstrating exceptional client care, ONP used the robotic systems to proactively identify affected clients and send targeted communications. For example: "Your property is due to complete on the 5th of April 2025, would you like us to bring that completion forward, to save you £2,000? If so, you need to urgently agree to a new completion date." Through these bulk automated updates, the firm pre-emptively addressed potential issues and provided clients with valuable financial guidance. Nick Milligan, Key Account Manager, LexisNexis Enterprise Solutions, comments, "This proactive approach to regulatory changes – which are often extremely challenging for firms – exemplifies how automation can enhance client service, allowing the firm to anticipate needs, offer solutions, and deliver tangible financial benefits to clients during challenging transitional periods. ONP has truly grasped the capability of Lexis Visualfiles and is exploiting it to the full."

Measurable success
ONP's data, technology, and automation-driven approaches are enabling the firm to maintain a client-focused approach, genuinely dedicating their expertise to legal, technical work requiring human judgment. On a standard remortgage file, case managers typically interact with the file only 5 or 6 times throughout its lifecycle, with approximately 80-85% of the process being fully automated. With such an approach, revenue growth is in-built into business operation.

Simmons concludes, "Staff involvement in every routine aspect of file processing is unnecessary. So, we have leveraged Visualfiles and other third-party integrations to standardise repeatable processes and strategically direct our case managers to concentrate on file complexities that resist automation or present higher risk factors where human expertise and decision-making capabilities are needed."