



Taylor Walton's In-house Conveyancing
Application Within Lexis Visualfiles
Delivers Quantifiable Efficiency Gains

Lexis® Visualfiles™

Taylor Walton Case Study

Industry: Legal | Product: Lexis® Visualfiles™

Taylor Walton is a leading regional law firm providing legal services to businesses and private clients including commercial litigation, corporate law, wills, probate, family law and employment law through to commercial and residential conveyancing. The firm has offices in Harpenden, St Albans and Luton.

"All these efficiency savings are making a tangible difference to the business."

Stuart Wickham, Partner, Conveyancing Practice, Taylor Walton

The firm has leveraged the Lexis® Visualfiles™ workflow and case management platform to develop its own in-house conveyancing application, Visual Convey, within the solution, which is used by the conveyancing team across the firm's three offices. Stuart Wickham, Partner of the Conveyancing practice at Taylor Walton Solicitors, talks to LexisNexis Enterprise Solutions about why Visualfiles is well suited to the business and the benefits that the platform is delivering to the firm.



Enterprise Solutions



What is Taylor Walton's Visual Convey and why has it been created?

Stuart Wickham: Visual Convey is the name we have given to our in-house conveyancing application that we have created within the Visualfiles platform. We have adapted the Visualfiles out-of-the-box conveyancing functionality to our needs using the rapid development toolkit that is inherently part of the solution.

Visualfiles provided starter applications that are functionally rich and we wanted to just take the features and workflows that best suited our needs and strip out the rest. This approach has allowed us to simplify and customise the system to meet the needs of our users. We adopted the business critical functionality immediately, but with a view to continuously evolve the application as user and market requirements change over time. Visualfiles is a very flexible and customisable technology, which is exceedingly advantageous to us.

How long did it take your IT department to develop Visual Convey?

Stuart Wickham: We started development work within Visualfiles in 2014 with a view to a phased testing and roll out individually across the three offices. It was relatively simple to create the application as the foundation already existed in Visualfiles. Interestingly, Visual Convey was conceptualised using a humble paper flow chart – we moved things around, added processes and workflows to make it relevant to us – and then mirrored it technically within Visualfiles to create the application. A team of just three technical people (two IT staff and one developer) developed and tested the application.

The toolkit Visualfiles provides is very powerful. For the roll out, we brought on board our Human Resource trainer to help with facilitating user adoption.



Underpins the conveyancing department



A tailored system - to meet the specific needs of the business and users



Easy to implement - team of just three technical people developed and tested the application



Improved the level of case management systems adoption in the firm



Provides out-of-the-box starter applications and connectors to most of the commonly deployed third-party systems in the legal sector



Did you consider any alternative case management systems that are available on the market for this application too?

Stuart Wickham: We've had demonstrations of other case management systems in the past, but we found Visualfiles most suitable. Visualfiles offers a number of out-of-the box starter applications and connectors to most of the commonly deployed third-party systems in the legal sector, so using it as the underlying platform for Visual Convey was a logical choice for the long term. Such is the extent to which the system can be tailored.

What is the adoption of Visual Convey across the firm?

Stuart Wickham: Currently about 50 people use the system in the three offices. Visual Convey has improved the level of case management system adoption in the firm. For example, previously, users were simply inserting precedents into Word documents. Today the application is assisting users not just with document production, but also with transaction completion processes. The majority of the conveyancing department's workflow goes through Visual Convey. We started with sale and purchase work and gradually other activities of the department such as remortgage and plot sales will also be processed within Visual Convey.

What benefits are you gaining from Visual Convey?

Stuart Wickham: The biggest gains are in time savings. For instance, the time taken from the exchange of a contract to its completion is now measured in minutes rather than hours per transaction. Also, within Visual Convey, we have created a

'Quote' app to enable us to quickly quote for transactions to customers. So now the process from quoting to a customer to launching the transaction in Visual Convey is much quicker. In fact, we are saving substantially on data storage too. Unlike previously, where there was no single location for storage of quotes and information on transactions, today everything is stored within Visualfiles. The lawyers are able to use Visual Convey right from the quote stage to creation of a matter through to completion of the transaction. Today, opening a file within Visualfiles, following approval of a quote by the client, takes no more than 30 seconds.

All these efficiency savings are making a tangible difference to the business. Rather than spending time on administrative issues, lawyers can actually focus on the transactions and indeed take on more client-related work as their time spent on mundane, routine tasks is substantially reduced.

What are your future plans for Visual Convey?

Stuart Wickham: Our Visual Convey system on Visualfiles truly represents a new and different way of processing work. We are using feedback from users as input to evolve the system and make it better incrementally. We are also looking to expand the use of Visualfiles to other legal services too such as family law and commercial litigation.



Lawyers can take on more client-related work as their time spent on mundane, routine tasks is substantially reduced.

✓ Visualfiles is a very flexible, customisable and powerful technology, which is exceedingly advantageous to Taylor Walton

✓ Their biggest gains are in time savings provided by Visualfiles Convey;

- Time taken from the exchange of a contract to its completion is now measured in minutes rather than hours per transaction

- Opening a file within Visualfiles, following approval of a quote by the client, takes no more than 30 seconds

- The process from quoting to a customer to launching transaction in Visual Convey is much quicker

✓ Assists users not just with document production, but also with transaction completion processes

"We are also looking to expand the use of Visualfiles to other legal services too, such as family law and commercial litigation." Stuart Wickham, Partner, Conveyancing Practice,



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

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