Thorntons Benefits from a Planned Approach to a Lexis® Visualfiles™ Upgrade.

Lexis®Visualfiles™

Thorntons Solicitors Case Study

Industry: Law | Product: Lexis® Visualfiles™

LexisNexis Enterprise Solutions managed upgrades – a 'no brainer' says Thorntons.

Thorntons is one of the largest full service legal firms in Scotland, providing a full range of services for individuals and families, businesses, public sector organisations and charities. With offices across Dundee, Angus, Fife, Perth and Edinburgh, there are 54 partners supported by over 427 colleagues across 13 locations.

The firm is a longstanding user of the legal workflow and case management system, Lexis Visualfiles with every legal department benefiting from some level of automation and volume parts of the business depending heavily on workflow. The firm recently upgraded to the latest version, Sarah Blair, Director of IT at Thorntons, talks about her experience of the upgrade and the value of being on the current version of the software.

What were Thorntons' reasons for upgrading to the latest version of Lexis Visualfiles?

Sarah Blair: As a firm, we need to be flexible and agile in the way that we work. We now work with specialised centralised "hubs" in many areas, which means that work needs to be easily moved around, and many of our users regularly work between several offices in the course of a week. This in turn requires a complete move away from reliance on paper files. Hence, the key business driver for this upgrade to the newest version of Visualfiles was to enable and support the firm in 'File Free' working, which not all departments had adopted.

From a monetary standpoint, we still spend a substantial sum on the physical storage of paper files. As a firm, we have a strong focus on profitability, so a File Free approach to working is also an easy win for reducing operating costs.

And of course, now with the GDPR, a structured approach to electronic file retention is imperative.

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What is your firm's approach to Lexis Visualfiles upgrades?

Sarah Blair: In previous years, we undertook the upgrade on our own. We decided which version of Visualfiles we wanted to upgrade to, identified the differential functionality from our existing version, and project managed the process ourselves, without involvement from LexisNexis. Upgrading an enterprise solution such as Visualfiles is a major initiative and we didn't always have organised processes for installation and testing so we often experienced disruption after "go live", and more importantly, we weren't able to quickly optimise the use of Visualfiles in the firm.

This time round, we worked very closely with the LexisNexis team right from the beginning of the upgrade process. Aside from the fact that the process has been smooth from start to finish, the value of immediately being able to capitalise on new features instead of being distracted by bugs or issues has meant that this upgrade has immediately made a positive impact and enabled us to push ahead with File Free working as standard across the firm.

So, how was this upgrade different to previous ones?

Sarah Blair: This upgrade was a complete contrast to previous upgrades. We planned it strategically and tactically – thinking about longer term objectives alongside immediate activities. Understanding what was really important to the business helped inform the upgrade process. With the expertise of LexisNexis, we were able to ensure it was both implemented correctly technically, as well as communicated and branded appropriately for users in the firm.

We undertook rigorous testing of the solution across the environment. This ensured that we ironed out any potential issues upfront with Lexis Nexis, which positively impacted user experience and adoption.

We also branded the upgrade differently this time. It wasn't about a software upgrade, but more about deploying the capability to work File Free. We engaged with users to find out what their frustrations were; and then worked with the LexisNexis team to find solutions as we configured and developed the most recent version of Visualfiles. That's the great strength of Visualfiles, it's highly flexible and can be tailored quickly to match the business needs.

Tactically, the upgrade was fully managed. The dedicated LexisNexis Project Manager played a vital role in helping us successfully deliver on time and within budget. LexisNexis has years of Visualfiles project delivery experience, and their team provided great insight into how we could ensure that this upgrade was executed smoothly. The fact is that no matter how hard we try as a team at Thorntons, we simply don't have that level of knowledge into either the upgrade process or Visualfiles itself.

The Project Manager helped us plan the upgrade in a structured manner, which ultimately delivered a successful project. The Project Manager ensured we had support to compare the existing version of Visualfiles with the new release, identify the new features and functionality available in the current version, and establish what was essential to deploy. This is not only a painstaking process, but requires an in-depth understanding of the solution, which we as a customer simply can't have.

Crucially, we implemented a clear testing plan for each of the applications, complete with diagrams and individual instructions for testing all the new features and functionality as well as existing workflows. This was invaluable as when the upgraded version of Visualfiles went live, it worked smoothly. Considering the extent of the solution across the business, we encountered very few problems; which was completely different to previous projects.

What approach did the firm take to go-live?

Sarah Blair: This too was different this time round. Rather than have the IT team carry the burden of user adoption entirely on its shoulders, we designated and trained super users in every department who were responsible for delivering short 30-minute demonstrations of new features and functionality as well as providing supporting information for Go Live and 'walking the floor' to answer questions.

For example, they had a "handy five step guide" to set up new features such as the preview pane. These were created by the IT team and greatly helped manage change. In addition to user adoption, this approach helped reduce the load on our helpdesk on 'Go Live' day. This was important as we went 'big bang' – all 13 offices using the new version on the same Monday morning!

All through this, the LexisNexis Project Manager was completely involved, helping us to iron out the minor issues that did crop up after Go Live, and ensuring that we logged calls properly so that every problem could be appropriately addressed.

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We knew the upgrade of Visualfiles was a success when one of the Partners, who was sceptical of the promises of the new version, personally came to tell me that he loved it – it all worked, he liked the interface and the new functionality was excellent. What more could one ask!

What business benefits has Visualfiles provided the firm?

Sarah Blair: We are genuinely making headway in a File Free approach to working. The Preview Pane is a massive benefit as users can flick through Visualfiles in the same way that they can flick through a paper file. The improved email management capabilities of Outlook Plus such as the new indicator of an email being saved, and drag and drop, is making life much easier. In addition, we've introduced features to alleviate previous pain points such as drafting and collaborating on documents.

File Free working is delivering flexibility and even continuity to the business. To illustrate, in the event of adverse weather during the "Beast from the East", we had a large proportion of staff, including fee earners working from home or another office. Agile and File Free working, 'powered by Visualfiles', facilitated this easily.

So, what's next on the cards for Visualfiles?

Sarah Blair: Previous reservations about the challenges of adopting the current version of Visualfiles have been dispelled with this upgrade. In fact, we're looking forward to being an early adopter for the next release of Visualfiles. While previously we have always only ventured into upgrades once a year, we are now confident that we can undertake these more often.

We now have an excellent platform to build upon. We already have our sights set on exploring additional functionality such as SmartForms, Online Toolkit, History Plus and the Software Development Toolkit (SDK).

This upgrade has demonstrated the value of a planned and structured approach to a software upgrade. The previous upgrades of Visualfiles were painful, in the main because we didn't do it right. This time round, with the support of LexisNexis, our Visualfiles solution delivered benefits straight away. This really demonstrated the business merit of involving the supplier in an upgrade – they are knowledgeable and have the necessary experience to ensure that the new version of the solution is delivered efficiently and cost-effectively. Today, we can confidently say that this approach is a no brainer.

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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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