

Epping Forest District Council manages workflow with Sage CRM



Customer

Epping Forest District Council

Industry

Government

Location

UK

Solution

Sage CRM

Epping Forest District Council, in the United Kingdom, handles a wide range of legal matters. These include: contracts; prosecutions; conveyancing; debt recovery; planning appeals; licensing; planning enforcement; traveller issues; and landlord and tenant disputes.

The challenge

For a relatively small council, the workload is busy and extensive. At any one time, there may be up to a thousand cases in progress, all managed by a team of just a dozen fee earners and administration staff. With increasing pressure on resources, Legal Services sought new ways to increase its efficiency and streamline the way it manages this heavy caseload, while providing a professional, good quality service.

The solution

The department needs to maintain careful watch on the time spent advising other Council departments, such as Housing, Finance, Environmental, Town Councils and Planning, on legal matters, so that it can accurately cross-charge them and meet internal accounting requirements. Legal Services had developed a good working relationship with Sage Business Partner Tricostar, and in 2005 it changed over to the new time management and case management system.

In 2004, Tricostar launched a new package that had obvious potential to assist the department's work. TCM (Timebase Case Management) was based on Sage CRM, the award-winning, web-based customer relationship management (CRM) solution, with adaptations to meet the specific requirements of legal professionals.

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Fareeza Sheikh,
Senior Legal Officer,
Epping Forest District Council

Challenge

With a busy and extensive workload and increasing pressure on resources, Legal Services sought new ways to increase its efficiency and streamline the way it manages this heavy caseload, while providing a professional, good quality service.

Solution

Sage CRM was customized to support case management, time recording and a tailored workflow. As a result, it supports the requirements of legal professionals and complements their way of working.

Results

The solution has become an integral part of the way the Legal services team works. Now, by having instant access to critical information either in the office or out of hours, they are able to use their time more productively and better service their internal clients. The solution has also helped the service to achieve and keep its accreditation to the Law Society's Lexcel practice management standard.

‘The system is really good and allows us to better use, share and manage information. It helps us to save time while improving service to our internal clients. All the relevant documentation is presented, with the system churning out the right documents, with the right information populated in all the right places. This saves a great deal of time previously spent finding and collating information.’

Fareeza Sheikh,
Senior Legal Officer,
Epping Forest District Council

Fareeza Sheikh, Senior Legal Officer at Epping Forest District Council, comments, “The solution offered full case management, time recording, workflow and CRM capabilities. It was tailored to our type of workload and reflected typical legal processes, so it would complement our own working practices.

Tricostar customized Sage CRM to include a time-recording component

Although Epping Forest District Council was Tricostar’s first Sage CRM-based TCM implementation for a local authority, the upgrade went smoothly. Once the system had been rigorously tested, the installation and data transfer took only a few days.

Fareeza said, “It was a major transformation in the way we work. Moving over the data was relatively painless but we did make a lot of calls to Tricostar in the early days, as we got to grips with our new system. It was very reassuring to have the experts on hand and they were very good at making any adjustments we required, for example helping us to set up the summary pages to accommodate our own terminology.”

The benefits

With the solution in place now for six years, it has become an integral part of the way the Legal Services team works. Fareeza says, “The system is really good. It does what we need it to. It helps us to save time while improving service to our internal clients. During phone calls, we have the information right in front of us on our screens, rather than having to trawl through filing-cabinets. Furthermore, we can pick up colleagues’ cases, if they’re out of the office. All the documentation and their annotations on anything especially noteworthy are all there.”

“We’re self-compliant as a department and having a clear record of where time has been spent enables supervisors to check whether our targets are being met in terms of hours worked. It helps us to see, quite literally, where all the time goes.”

Having the system has also helped the service to achieve and keep its accreditation to the Law Society’s Lexcel practice management standard.

The system is accessed by up to 25 users across the council. Users include colleagues in other departments, such as a committee officer who views the progress on cases and a finance officer who uses it to gain updates on debt recovery. The council’s typing bureau also records new cases on the system. The solution is web-based and can be securely accessed remotely. This means that any TCM user can review their cases outside office hours.

Improved workflow management is another important benefit of this solution. Legal Services can implement workflow in order to control and formalize business processes. This ensures all aspects of the council’s legal work are handled, documented and recorded according to set processes. This ensures all aspects of the council’s legal work are handled, documented and recorded consistently, according to set processes and without reinventing the wheel every time.

Fareeza says, “The advantages of using the system for workflow are substantial. We are prompted with the next step, and checks and balances ensure our processes are always followed correctly. All the relevant documentation is presented, with the system churning out the right documents, with the right information populated in all the right places. This saves a great deal of time previously spent finding and collating information.”

She notes that, once again, as well as improving the efficiency of the individual, it makes it much easier to pick up a case for an absent colleague: “We know exactly what we’re meant to be doing; we simply click on the next stage. It’s a great time-saver. Everything we need to know about the case, with all the contact details, is available in a single, centralized location. We can add comments, perhaps from a phone call with a planning consultant, for example, and note anything critical, such as waiting for a court date.”

The future

Tricostar continues to provide long-term support to the Legal Services department. Fareeza says, “In a fastchanging world, Tricostar are always reliably there to provide knowledgeable support and fix any problems very quickly.”

A future development, currently under consideration, is the possible rollout of electronic court bundling and electronic archiving. These are TCM modules, based on Sage CRM, which will streamline the collation and management of large volumes of documentation and will support the council’s drive to becoming paperless.

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

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