

Sage CRM based solution helps Suffolk County Council Legal Services face the future with confidence



Customer

Suffolk County Council Legal Services

Industry

Local Authority

Location

UK

Solution

Sage CRM

The Legal Services department of Suffolk County Council delivers accredited services to internal and external customers, and it operates in partnership with district and borough council legal teams as part of the award-winning Doing Business Better project.

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The challenge

In 2006, Suffolk sought a case management system that would combine time recording with document management. The aim was to make it easier to share legal expertise and capacity between councils in Suffolk and to closely track the time spent on projects.

The strategic direction was provided by the 2003 Gershon review of public sector efficiency emphasising further the impetus for identifying and delivering efficiencies in service provision.

The solution

For many years, the Council had been using a time management software package developed by Sage Business Partner Tricostar. It was the first step in moving to a more business-like approach to the management and delivery of the in-house service. The company recognized delivering a more effective and efficient service, with access to comprehensive real time management information, was fundamental in informing key decision making.

‘The system we have developed... means that we can easily demonstrate that we provide a good quality professional service at a very competitive cost.’

Sally Longmate,
Practice & Business Development Manager,
Suffolk County Council

Challenge

Suffolk County Council recognized the importance of sourcing a case management system that would combine time recording with document management. Its aim was to find a more efficient system that would allow it to share legal expertise and capacity between Councils in Suffolk and closely track time allocated to projects.

Solution

Sage CRM was customized to include a time recording component and field names were tailored to support legal documents and processes.

Results

The implementation of Sage CRM transformed Suffolk County Councils future approach to managing business processes.

It has allowed for the accurate management of information resulting in sound business decisions and an in-depth knowledge of complex workloads. This has equipped the Legal department to devise a clear strategy for progressing its work.

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Sally Longmate,
Practice & Business Development Manager,
Suffolk County Council

Tricostar customized Sage CRM to include a time recording component and tailored the field names to fit and support legal departments, with field names reflecting the typical legal processes.

The solution, known as TCM (Timebase Case Management), is web-based. It integrates fully with Microsoft Outlook and can also be easily linked to any corporate email system.

Once the system had been rigorously tested, installation at Suffolk took only a couple of days. The system had to meet the challenge of customization across seven other independent legal teams working in partnership, with a view to shaping themselves to meet the Gershon efficiency targets. The innovative result was the first example of a shared service with a web-based CRM system.

The benefits

The system underpins a ‘virtual team’ model that means benefits are not limited by structure and geography, and expertise can be shared. Using browser-based technology, the system can be accessed by staff working remotely, wherever there is an internet connection. It also supports flexible working for the county’s employees, who can access all the information they need to work from any location across the county or from home.

The project has transformed the future approach to delivering services and managing business processes. Sally Longmate, Practice & Business Development Manager, explains the value the system has brought: “As it underpins all our legal work, the most valuable element and the one we have placed our main focus on is refining the time-recording function and that alone has enabled us to have confidence in the in-house value for money commodity that is legal services.”

The system provides improved information on costs for client departments and external customers.

Giving an example, Sally says: “We can apply the system to a major project, for example, which may take three months to bring to fruition. We can quantify, in a simple pie-chart format, exactly what activities took place that made up the composition of that project and, most importantly, the associated cost in terms of staff time, differentiated by different levels of hourly rates, such as clerical, technical and, managerial. The information realistically reflects what work was done, who it was done for and what it cost.”

Critically, the case management system is not just about recording time. It ensures a flow of seamless and accurate management information for sound business decisions. By monitoring the department’s activities and analysing the information generated, managers have gained a firm operational grasp and an in-depth understanding of the skills required to handle a complex workload. This equips them to devise a clear strategy for taking the department’s work forward.

The full system is made up of over 150 users, including district and borough legal teams, with security and integrity of data being protected by bespoke firewalls. A major benefit of a crosscounty approach is the availability of a system to smaller in-house teams who individually would not have been able to acquire such a powerful system.

The next-stage desired outcome for the system is the application of process improvement moving to operational workflow management. The aim is to reduce duplication and inefficiency and increase capacity. One of the key learning outcomes is that, to maximize the benefits of Sage CRM, Legal Services challenge its processes rather than merely replicate what it currently does. As a result, Legal Services identified and eliminated previously unknown inefficiencies and has found more efficient ways of working.

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Sally said, “We have learnt to understand the way people handle their day-to-day work, and taken important ‘time out’ to stand back and dig deep into what happens and therefore what is required, day in and day out. The benefits are that we are keeping our best practices, identifying more efficient ways of working and creating a team-lead shared knowledge and precedent bank approach using the Sage CRM system.”

She said, “Being able to apply process improvement to document and email templates linked to workflows, where appropriate, will reduce duplication and inefficiency and increased file capacity for professional staff and mean significant changes in the way people work.”

A key achievement has been the integration of both ISO 9001 standard and Lexcel, the Law Society quality standard, into the system. This means that Suffolk’s quality processes are embedded in everything the team does; this is an important advantage when competing for work.

The undoubted strengths of the system in supporting district and borough level of collaborative working have been recognized at corporate level and Suffolk County Council has already rolled use out across other functions.

As a result of this innovative approach, Suffolk Legal Services won the Cipfa, Shared Services Award in 2007. It was also the first outright winner of the In House Legal Department Initiative of the Year Award in 2008.

Sally said, “What is the minimum a business should know about itself: what it does; who it does it for and what it costs. Link this with the expectation that our council tax will be utilized in the most cost-effective way and you have the starting point for our in-house legal team’s approach to case management. The system we have developed using Sage CRM means that we can easily demonstrate that we provide a good quality professional service at a very competitive cost.”

The future

In the current climate there is no room for complacency. Suffolk is aspirational and constantly looks for new ways to extend its usage of the system.

The system now provides court and case bundling, which is seen as an essential requirement for a professional legal service.

Improved document management processes means improved access to information for customers, who can now see the current status of legal work. A major benefit for Suffolk will be in reducing the cost of archiving paper files as it will simply be the case that, once closed, a file will be held as a PDF. This will definitely help it to meet its green objectives.

Solution overview

- A system that supports an innovative approach to increasing efficiency
- Tracked information on time provides a firm foundation for planning and budgeting
- Economies of scale with a countywide system
- Improved sharing of legal information, expertise and capacity within a secure environment
- A system that retains learning and knowledge and is flexible and responsive when developing new ways of working
- Continued expert support from Sage Business Partner Tricostar

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.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

