

Microsoft Dynamics CRM wins trial at Legal Costs Associates



LEGAL COSTS
 ASSOCIATES

Industry

Legal

Challenges

Like many growth organisations, Legal Costs Associates were faced with the continual challenges of their existing solution being out of step with the evolution of the business. With management information on a multitude of system including Access databases and spreadsheets, the management team did not have a holistic view over clients and clients information.

Solution

Legal Costs Associates implemented a Case Management solution using Microsoft Dynamics CRM 4.0 with consultancy and development from Crimson Consultants.

Results

The streamlined business processes and automated escalation means the solution manages by exception resulting in the staff using their day on more productive activities. The solution now enables the business to grow and scale to meet current and

"Such is the complexity of our business, it used to take us hours to produce an invoice—the new system does it at the click of a button. We have realised a considerable ROI"

Mark Ludlam
 Director



"We improve our client's claims process and drive out cost"

Legal Costs Associates provides clients with innovative solutions enabling the public and private sector to control costs, improve visibility, significantly raise efficiency levels and achieve improved risk management within their claims management processes.

Legal Costs Associates are a rapidly expanding organisation and needed a system that not only managed the increasing number of cases they were receiving, but provided sales automation, the ability to market from their client management database and the ability to accurately forecast their revenues

"We have an array of offerings to our customers and it was important that the new system could be setup in a way that allowed my staff to focus on the client and their needs rather than on updating the administrative system. With developments from Crimson Consultants, we chose Microsoft Dynamics CRM as it provides a flexible platform that can help us drive the marketing, sales and case management processes", said Mark Ludlam Director at Legal Costs Associates.

Mark went on, "A key aspect of any consultation we provide is the measurement and control over the cost savings we provide for our clients: the new system provides a highly flexible charging structure that provides us with an accurate billing facility. In practise it means that we can define an upfront agreement with our clients and then using the audit facility and activity tracking of the system we can demonstrate our effectiveness in the cost reduction p r o c e s s t o o u r c l i e n t s " .

The solution at Legal Costs Associates includes the use of two module of Microsoft Dynamics CRM and the development of a new Case Management module. The following key features were included in the first phase of implementation:

- The ability to track case activities and register the chargeable nature of each phone call, email, letter or fax.
- Streamline the cost negotiation process to instantly record and audit all offers made and received during the negotiation lifecycle.

Return on Investment

“When Crimson demonstrated the Microsoft Dynamics solution we were impressed with its flexibility and integration with the systems we already had in place. Our due diligence process proved that Crimson had the pedigree to deliver and combined with the Microsoft Dynamics platform we felt as a Board that the investment was worthwhile. With the costs of our previous IT system spiralling we now feel with this investment that we have a solution to meet our needs now and into the future”

Christian Briggs

Business Development Director

- The ability for CRM to generate invoices for clients, meaning that all billing is done accurately and quickly.
- A sophisticated charging structure feature accounting for multiple billing types.
- The ability to perform minute-by-minute revenue forecasting based on actual case activities and cost negotiations.
- Extended security model to grant access of the right information to the right person in the organisation.
- Complete quality control management features to ensure that all outgoing written communications can be passed through QC procedures.
- Framework for liability forecasts for Legal Costs' client base ensuring they have complete visibility over their case loads.
- The ability to market to prospective and existing customers through the use of letters, emails and newsletters.
- Ability to profile clients, together with past financial history, industry sector and details on incumbent cost consultants.
- Tight management of key dates, including court dates and deadline dates for key legal documentation.
- Use of the underlying Workflow feature of CRM to generate reminders, email alerts and follow up calls.

Solutions That Work

'Works The Way You Work'—meaning it integrated seamlessly with the software already in use at Legal Costs Associates including Office and Outlook.

'Works The Way Your Business Does' - the project has been a good example of how the Microsoft Dynamics CRM product can be used as a development platform to provide a highly tailored solution to meet the exact needs of the customer.

'Works The Way IT Should' - the existing Windows Server infrastructure was ready to provide the platform on which to implement the CRM solution.

The success of the project at Legal Costs Associates has been a combination of the right product, Microsoft Dynamics CRM 4.0, the right approach, using elements of Prince II to ensure early staff buy-in to the project, and the right partner, Crimson Consultants.

The role of Crimson Consultants in this engagement

Crimson Consultants provided business, technical and development expertise using Microsoft Dynamics CRM 4.0 and SQL Server 2005 to deliver the solution to Legal Costs Associates. The project included business analysis, consultancy, development, training and project management. The project duration was just over 5 months in duration. Future possible directions for the system at LCA include exposing aspects of the Case Management solution to provide a self-service offering to their clients that would enable the upload and download of files, an online reporting tool that accesses key client data and the ability for the system to help with the generation of 'approved' texts of key legal documents including responses to the Points of Dispute.

About Crimson Consultants

Crimson Consultants are a UK-based consultancy firm specialising in business improvement through the use of integrated business management applications. Using tools such as Customer Relationship Management (CRM), document management and internal and external collaboration solutions, Crimson help provide organisations with competitive advantage that is innovative and evolve with the changing needs of a business.

