

Legal Practice Case Study



Guiding an international legal practice through business process changes to increase its fee-earning capacity without an increase in headcount



Challenges

- Growth plans to be realized through entering a new market
- Departmental protocols have developed organically over time
- Need to adhere to strict international compliance laws
- Combination of repetitive & mundane admin tasks impinging on fee-earning time
- No internal tech expert

Benefits one – Confidence

Hero package Monday.com was chosen with confidence and part of the investment was immediately offset by a reduction in overlapping software licenses such as Paymo

Benefits two – Efficiency

The holistic view of the business processes meant that efficiency dreaming was possible and a new way of working was devised

Benefits three – Savings

Within days of new workflows being setup, there was improved clarity of resource management and greater confidence in project allocation.

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Objectives

"My current processes are fine, we don't have a large number of clients, and all our team are legal experts, but I know there are benefits to be had from AI"

Having started from a tech-curious perspective, Spark Legal identified its project management process as the key to excellent service delivery, it's 'hero process'. So it wanted to transition its business to a purpose-built PM platform while minimizing the impact on business as usual and improving connectivity between software tools and business processes throughout the business.

Solutions

Part of the .team worked with Spark to evaluate potential hero PM platforms, reviewing existing software tools and apps. We identified those that would become defunct when the new system was up and running, being mindful of future integration compatibility.

We walked the Spark leadership team through our templates for identifying key business processes, and impactful client and partner touch points, to identify inefficiencies and envision how to do things differently and as automated as possible.

The implementation stage involved migrating their data from existing systems and setting up Monday.com after the overriding delegation, project and invoice structure had been mapped out. Following the setup of the new PM system, we agreed on the priority of departments to automate, zooming in to review the jobs to be done to identify the quick workflow wins.

Stepping back up to the company level we then worked through the departments methodically identifying trigger apps, events, and actions, developing both simple and complex workflows with many interdependencies. With future maintenance in mind, we documented the automations.