

CASE STUDY



The Firm

Lupton Fawcett is an award winning **Top 150** UK law firm with an expert team of dedicated solicitors in Leeds, Sheffield & York.

They provide the full range of private client legal services to individuals and an extensive range of corporate and commercial legal services to businesses throughout Yorkshire, the North of England and across the UK.

Practice areas

Full-service law firm. Forms are used across private client, family, dispute management, corporate, residential and commercial property

“FormEvo’s cloud-based legal forms take the stress out of filling in a form and make life easier for our fee earners due to pre-population. This allows fee earners to do more fee earning work and make money which is what they want to do”

Overview

Lupton Fawcett currently use the Visualfiles Case Management and iManage Document Management System. They needed to find a forms provider that could integrate with their Visualfiles Case Management system. FormEvo were recommended to them as they have a usage-based pricing model and it was therefore an ideal solution for their legal teams.

Challenges

Their current forms provider was proving inflexible. The Form H was taking almost two days to complete and private client IHT forms had to be inputted manually and took a lot of time and fee earners were frustrated with the time it took to input and process forms. They needed to increase efficiency by reducing manual data entry and automating routine tasks, and also needed to be able to share forms for completion/approval with other parties and they were advised that integration with FormEvo would be the perfect solution.



Solution Process

Lupton Fawcett needed to find a forms provider that could integrate with Visualfiles and as a result, Zylpha provided the FormEvo/Visualfiles integration.

- 1 Lupton Fawcett are able to open documents from within FormEvo without having to go to the website – this has the added bonus of auto populating information in that document with the data contained in Visual Files
- 2 Specific workflow bundles can now be used and save significant time and reduce errors across form bundles through auto population and auto calculations. Lupton Fawcett can also quickly and easily share and collaborate on the form completion process with colleagues and clients
- 3 FormEvo's proven API means Lupton Fawcett's clients gain added value from our system as forms are auto populated and saved quickly back to the matter file and Form Evo Share – Shows the documents that have been shared using Form Evo Share
- 4 FormEvo forms are protected behind https and automatic log-out means Lupton Fawcett cannot leave a screen logged-in revealing potentially sensitive data. The Peer review setting is particularly useful and with the creator of the form actually able to submit final version.

Return on Investment

The more time saved meant that the more money the firm could earn. Previously, private client IHT forms cancellations had to be done manually and took a lot of time. With FormEvo, the information was input once and it was then all linked and refreshes in real time.

Whilst the Family team use FormEvo to share forms with clients, Lupton Fawcett also have Visualfiles integration for Dispute Management, Family and Private Client which allows the data added in VF into the Form N260 and Form H. This has made a big difference when completing Form H which previously took a day or two to complete.

Also, due to pre-population, solving one problem actually meant that 3-4 problems were solved. FormEvo's flexible license structure made it easy to scale up and down



Training

Initially, all of the main practice areas had live training with FormEvo and as a result, the family law team went live straight away. They felt that the training given was easy to understand and slick. From this, their internal training team have been able to train new staff & partners who feel confident with how it works.

Results

Full integration between FormEvo and Visualfiles has had outstanding results. It has helped them work more efficiently and effectively and fee earners have been much happier as is has reduced the amount of time they have to spend on form filling, and having the audit trail of usage and management reports of what forms are actually being used, has been a huge benefit to the firm. FormEvo's response time to questions and changes is second to none and nothing is too much trouble

"FormEvo has been a massive success. Being able to integrate with Visualfiles means that we have saved 6-7 hours per case. This allows us to do more fee earning work and make more money"