

A complete guide to **transforming**
your law firm with workflows

Contents

Introduction	2
What is a workflow?	3
The 8 key benefits of workflows for law firms	4
How do I implement workflows successfully into my law firm?	9
4 workflow challenges and solutions	11
Osprey Approach Legal Workflow Software	13
Are you ready to use workflows?	15

Introduction

In a post-pandemic world, there's little doubt that we will rely more heavily on technology to meet the new demands of clients, who are expecting a quicker and more transparent experience. With several digital touchpoints and processes, law firms spend a considerable amount of resource completing admin tasks. This is where workflows can help to adopt a more streamlined process that boosts client satisfaction.

But what are workflows? What are their benefits? And what makes a good workflow?



What is a workflow

A legal workflow is a series of sequential actions within a given task. By mapping out each specific action, within a legal process or task, into a complete legal workflow you can use software to digitalise those processes and enable automation that improves efficiencies, client service, and productivity.

When processes are streamlined and standardised within a workflow it improves efficiency and increases productivity. The repetitive tasks within a lawyer's workload can be effectively managed from one location, which makes it easy to view progression at a glance, ensures nothing is missed and helps to automate processes.



Action

Choose from over 30 actions including send an email, add a keydate, or create a document.



Task

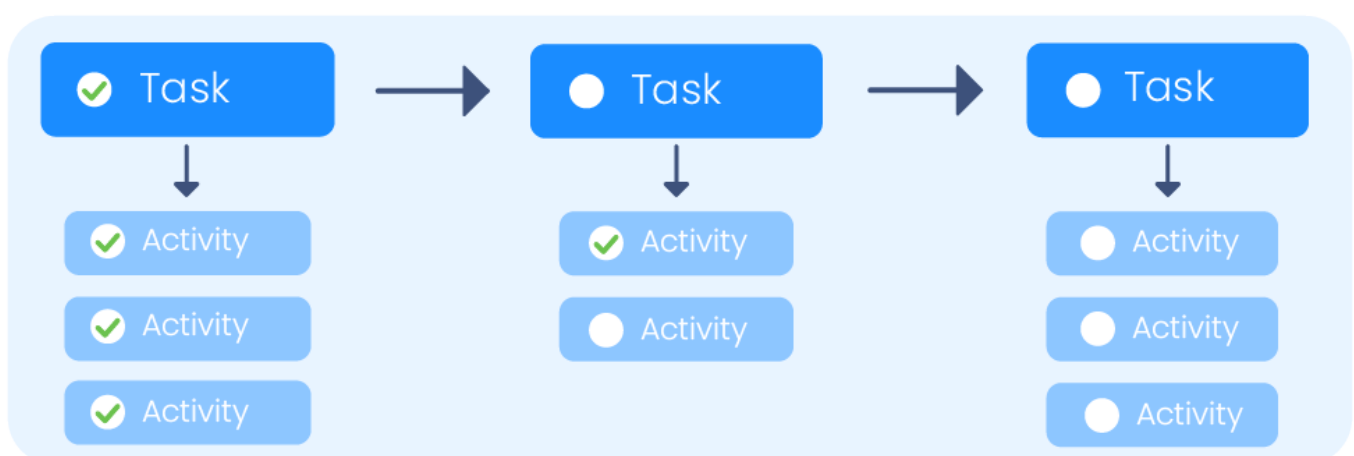
Associated actions create a task such as sending a client care pack in a property sale or submitting an application to court in a family case.



Workflow

Connect all tasks to build a workflow that helps you progress a case or complete a specific process.

Workflow Basics



The 8 key benefits of workflows for law firms

Firms are turning to workflows to save valuable time but that isn't the only benefit your practice can realise from successfully implementing workflows into your processes.

1 **Ease workload pressures**

We start with the key benefit; workflows ease the pressures of your workload. Workflows provide fee earners with the tools they need to complete tasks quicker and easier, so they are no longer spending time manually writing reminders, building documents, or chasing clients. Workflows provide an easy way to check on the progress of your case and helps to automate those repetitive and time-consuming email chases or key date reminders.

Preuveneers use Osprey workflows to lighten the workload. Their Managing Partner, Kelly, explains, "We were doing the work of ten people during [the COVID] lockdown, so Workflows and Document Production were an absolute lifesaver – making our tasks three times faster every day.

"With the workload we have experienced recently, I don't know where I'd start without them!"

2

Save money

The increased efficiencies that workflows offer save your firm money. From the reduction in both administration time and duplication of work, your firm can focus on building client relationships which increases recommendation rates and securing new clients by nurturing enquires.

Utilising workflows within your legal software enables you to capture key information once and automatically populate future documents or communication with that key data, to avoid duplication of data entry. Not only does this save you resource but reduces the risk of error (a key benefit we touch on later).

Newnham & Jordan Solicitors use Osprey workflows to reduce time spent setting up matters, which benefits them and their clients. They explain, "time savings are important for us and our clients. We use a host of workflows, especially around conveyancing work, which would otherwise be very time-consuming. There's a workflow in place for everything which means matters can be set up in at least half the time it normally takes."

3

Improve accuracy, reduce risk and stay compliant

Workflows enable you to build compliant and risk-free processes to improve the accuracy of the documents created and the communications sent to clients.

You can ensure key actions are listed, documents and communications are templated and standard compliance tasks are automated, which helps to ensure vital information is set out and not forgotten. By building these solid foundations to your processes, you not only have the confidence that everyone at your firm is following the right procedures, but it prevents data protection breaches and reduces risk.

Workflows can also be incredibly helpful to junior solicitors as the pre-defined tasks set within a workflow ensures they follow the correct procedures and compliance processes.

4

Stay in control of your firm

Workflows create confidence in the processes your staff are following; templates can be agreed and approved beforehand, meaning everyone is working from the same documents. This provides senior partners and management with improved control over processes and increased matter visibility which helps to manage firm reputation and client satisfaction.

5

Keep track of your cases, digitally

Missing key dates has serious repercussions but a workflow will ensure that matters and dates are dealt with on time. Fee earners can easily see the status of a matter as the workflow highlights the completed and outstanding tasks. This can become a digital to-do list and actions within a task can automatically set reminders into Outlook, helping to ease the pressure of remembering key dates or manually setting reminders. This is particularly beneficial for fee earners who are overseeing a colleague's client files if they are absent or on holiday; workflow provides visibility that helps keep your firm running smoothly.

6

Go paperless

Your fee earners can work anytime, anywhere, without the need for physical files. Workflows, within a case management software solution, help to digitally manage matters, which removes the need for paper waste and printing costs. Removing your reliance on physical files and focusing on an agile, adaptable, and flexible approach means that your firm is well placed to meet future challenges. Accessing a single source of reliable data from any location will ensure your firm can continue to operate whenever or wherever you choose.

Workflow actions to help you stay compliant

Questionnaire



Capture client, third-party and matter-specific details

Send Letter



Auto populate documents with details collected in a questionnaire

Add a Keydate



Record important deadlines for staff, clients or third-parties

Post to Client Portal



Send sensitive documents to clients via the Web Portal

Post to Deal Room



Send and collaborate on documents via the Deal Room

7

Win and secure new clients

With the business efficiencies created by workflows, you will benefit from an increased confidence in your ability to win clients and increase your capacity. Workflows help to elevate the challenges of keeping on top of several moving parts within a case, helping fee earners focus more energy on client enquiries, as well as increasing their capacity to take on more new clients.

8

Enhance the client service you offer

Having greater visibility of your cases in-house, means you can better communicate that to clients, which ensures a quicker and more reliable service. Clients will benefit from being up to date on their matters, since they are aware of what deadlines need to be met, while fee earners meet the required regulations and don't have to spend time following up with clients.

Where law firms offer a client-facing web portal, the enhancements to service increase further. Clients can enter their own information and run validation checks in the portal. The workflow then takes that information to build documents and upload to the portal when necessary. This helps the client to be self-sufficient and enables them to check on progress and access documents without the need to call and enquire.

Most of these benefits require well-constructed workflows using the best of current technologies and integrations, so it is important to set high expectations of the workflow engine you employ.

**“We were doing the
work of 10 people
during lockdown,
so Workflows
and Document
Production were an
absolute lifesaver –
making our **tasks 3x
faster every day.**”**

Kelly Cirillo, Managing Partner
Preuveneers

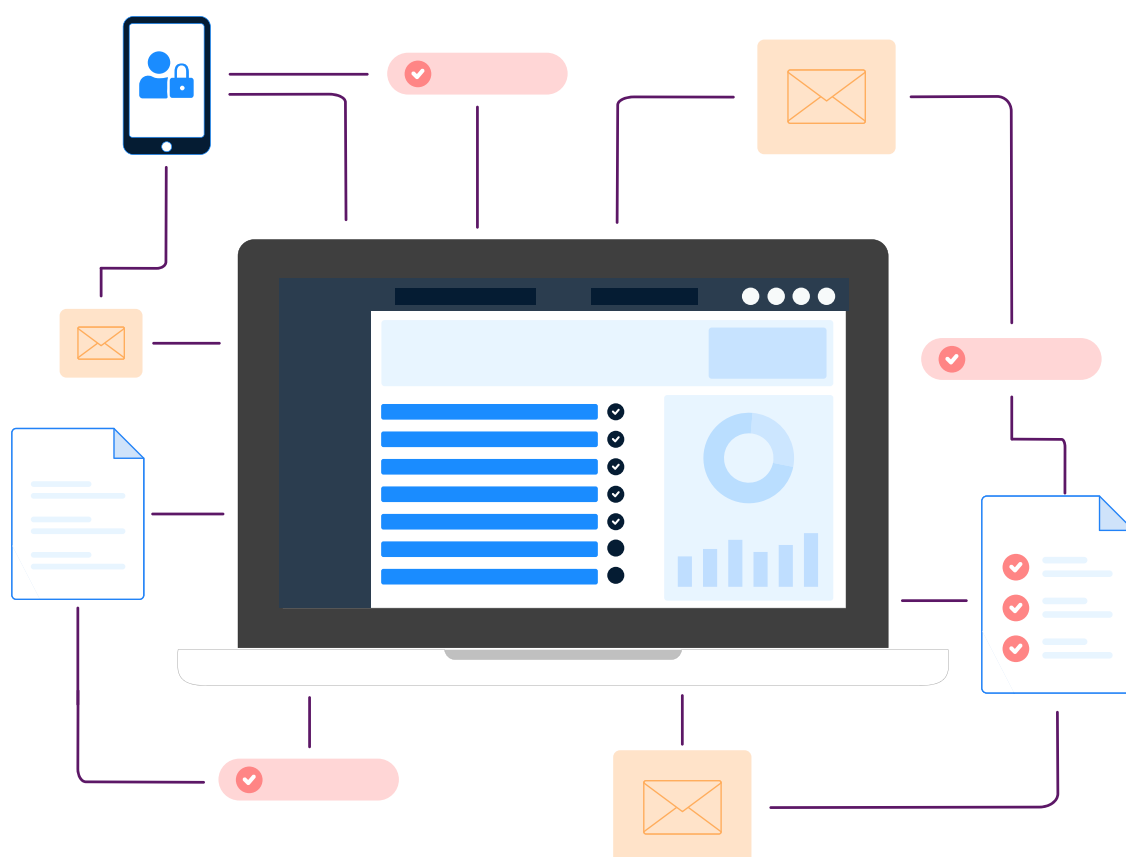
[Read case study](#)

How do I implement workflows successfully into my law firm?

It's important to note that workflows are created with the area of law in mind, not a specific firm, so building a successful workflow begins with the key processes relating to the case, rather than how your law firm completes these tasks.

The nature of workflows mean you can build as many or as few tasks and activities within a workflow, which gives your firm the freedom to use them where you'll benefit the most. All firms will benefit from using workflows even if you choose only to use them for opening and closing files and not for the tasks in between. There will always be tasks that are repetitive, no matter the area of law, and these are the tasks you should begin with when implementing workflows.

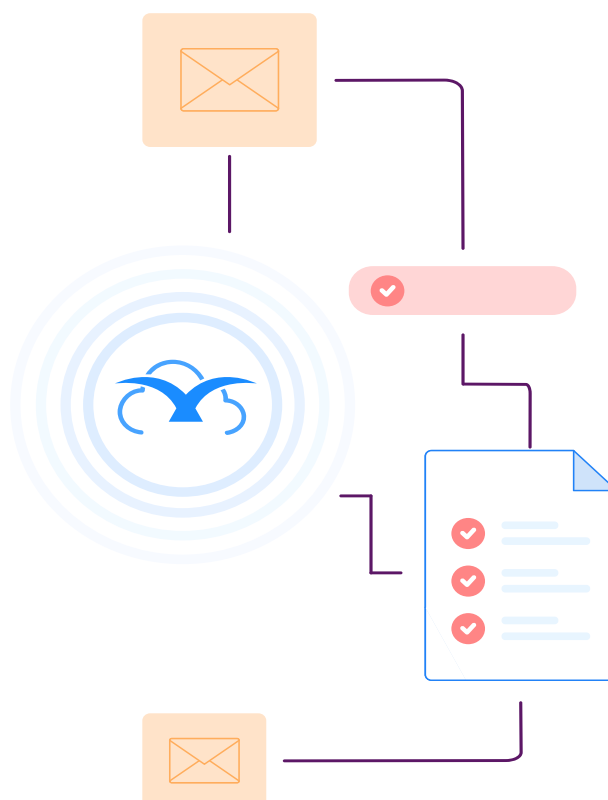
Once the key tasks and actions are detailed, the contents of those actions (documents, email, texts etc) can all be assigned templates which can be tailored and defined by your firm. Document templates and communications can be drafted and branded to ensure they meet your needs.



At Osprey, we provide out-of-the-box workflows that provide law firms with a great starting point to help save time and still reap the benefits of implementing workflows. We have dedicated Workflow Developers that ensure our workflows follow the standard processes for each area of law that you'll require, so you'll have all the relevant tasks and actions ready to use.

Law firms that benefit greatly from using workflows are those that dedicate time and resource to implementing them at the beginning. Deciding on the key actions, templates and processes needs commitment from everyone at the firm to get it right. But once the workflows are set up, you'll continue to reap the rewards in the future.

When you get it right, your specialised workflows will work across all areas, especially in particularly procedural heavy areas of law, such as conveyancing. Workflows will help to ensure good case management, target achievement, and high-level management reporting.



4 workflow challenges and solutions

Approving a single document template

Workflows require standardised templates to build and automate processes, however fee earners often have their own versions of documents and communications in play. Deciding, as a collective, how those templates will look and the information they will include is usually the first challenge.

Taking the time to define and approve a single template for all documents is not only the key to the success of workflows, but ensures compliance, quality client service and increased management control.

To start building your templates, begin by compiling all the required information so you have a starting point for your templates. For example, using the SRA's requirements to build your client care letter. Then you can look at how your firms particular branding will then define the style of document or communication.

Change management

and help with a move to workflows, which involves communication of the key benefits and allowing time for effective training.

Your software supplier should offer support throughout, and after, the implementation of your software and workflows to help manage the change and guide your firm to optimising the use of the software, but ultimately the change management and buy in needs to come from within the firm.

Software training and utilisation

Learning a new system and adopting new ways of working can distract from day-to-day tasks, which presents challenges for staff. The provision of simple, flexible and effective training is crucial to the success of any software implementation, but de

Simply implementing the system or digitising existing bad processes can cause friction and you're unlikely to achieve the ROI you expect. Invest the time at the beginning of the process and reap the rewards for years to come.

Reducing reliance on physical documents

Whilst this is a key benefit to workflows, there can sometimes be some resistance from staff who prefer to print reports to read and review.

Digitalising documents helps to ensure that only necessary printing is done. But it's important to remember that using software doesn't stop documents from being printed, so printing can be done when necessary, but reducing the reliance on physical files means your law firm becomes more agile and flexible to meet future challenges.

The [COVID] pandemic highlighted to Newnham & Jordan Solicitors the benefits of being digital: "Although flexible working had always been an option for our staff, [the lockdown] demonstrated just how agile the business could be.

"It showed that clients could be looked after wherever fee earners were based – and Osprey played a pivotal role in that."



Osprey Approach Legal Workflow Software

Complete tasks quicker using our easy-to-use, no code required, legal workflow automation tools. Legal workflows make repetitive admin-heavy tasks obsolete with smart time-saving automations that, when combined, have a big impact on your profitability. Drive long-term efficiencies and optimise your operations with Osprey.

30+ workflow actions available

Workflows are created by connecting a series of tasks which contain individual actions. To build your own or edit our existing ones, you can choose from over 30 actions to add to your workflows to help you progress cases or complete specific processes.

These include but aren't limited to:



Send emails or text messages



Display a message or prompt to the user



Create a templated document



Add a keydate or schedule a reminder



Allocate a questionnaire to capture data



Post time on tasks

Legal workflows built by lawyers to save you time

Built by our in-house legal experts, Osprey includes over 50 workflow templates for the various areas of law listed below. Each template is configurable; drag and drop actions, include your own document templates, and add tasks to customise the workflows for your team.

- ▶ Family
- ▶ Compliance
- ▶ Immigration / Asylum
- ▶ Commercial Property
- ▶ Residential Property
- ▶ Litigation
- ▶ Private Client
- ▶ Employment & HR
- ▶ Clinical Negligence
- ▶ Mental Health
- ▶ Personal Injury
- ▶ Debt Recovery

Functionality to build your own workflows:

Drag & drop tasks

Select from a list of tasks and actions and drag and drop them into your workflow.

Set criteria

Apply criteria and 'and / or' logic to certain action types to determine if the action will run or not based on the data held on the client's matter.

Configure run sequence

Build the workflow so it always runs in sequence or can be skipped or edited as it's progressed.

Set work-type defaults

Work types can be configured to automatically load the default workflow when a case is opened.

Sync tool

Even customised workflows receive top-level updates so you can be sure forms and actions are up to date and compliant.

Pre-built template library

Access over 50 pre-built workflows for 12 practice areas.

Unlimited, inclusive training & support

Our in-house support team and software trainers can provide training for your team so you can build your own workflows. They're also there to provide ongoing support to ensure your workflows are set up correctly for your firm.

Is your law firm ready to use workflows?

Workflows are created to replace the everyday - often mundane - and expensive administration that comes with running a law firm. This means time and efficiency savings for your business, but also a reduced workload for fee earners.

Workflows are designed to be used across your firm so that the benefits are easily realised. They can be configured to suit your specific needs, helping you formalise your processes in specific areas of law, such as divorce petitions or property transactions.

Utilising technology to automate procedural processes gives your firm a competitive advantage. Technology enables law firms to be flexible and adaptable, helping you to take on future challenges (whether local or global!) with ease.





Transform your firm

Osprey Approach provides law firms, big and small, with practice management software that streamlines processes to improve the efficiency and effectiveness of managing matters, producing documents, time recording, client service and invoicing.

Save time, reduce cost and stay competitive.

Get in touch to find out how Osprey Approach can future-proof your firm.

[Book a demo](#)

[Visit website](#)