



Ealing Council's Legal team saves thousands with Sage CRM.

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Nick Senior, Business Manager, Legal and Democratic Services, London Borough of Ealing Council

Client profile

The London Borough of Ealing Council in west London is the capital's third largest borough by population and area. It covers socially diverse communities from Southall in the west to Acton in the East.

The Legal team within the Borough's Legal and Democratic Services department supports the council's work with expert advice on an extensive range of legal matters, from childcare to planning.

The team offers an extremely efficient service and over the past three years, well before the recent Comprehensive Spending Review, it has been focused on making savings of around 25%.

The challenge

The department had been using a time management software package from Sage Business Partner Tricostar for around fifteen years. Through accurate time-recording, the team can give cross-charged internal clients complete visibility of the time spent on cases.

Nick Senior, Business Manager, Legal and Democratic Services, comments, "Recording time can bring to light issues which may well need discussion, but we believe that it's important for departments to understand how their budget is being used."

With a rising caseload and a constant drive to improve efficiency, the team looked for ways to improve its overall management of cases, by automating wherever possible, standardising processes, and storing information electronically.

The solution

The legal team's long-term relationship with Tricostar made the Tricostar TCM (Timebase Case Management) package an obvious candidate. TCM is based on

the Sage CRM web-based customer relationship management (CRM) solution, adapted to meet the specific requirements and terminology of legal professionals.

However, the decision to purchase TCM was never a foregone conclusion, as Nick stresses: "We went out to market and undertook a comprehensive review of what was on offer. We needed the right system at the right price, one that was compatible with the other systems in place, such as our corporate Novell email system. TCM scored highest in matching our requirements and, of course, knowing that we could rely on Tricostar for advice and support was a real bonus in building confidence in the proposed solution."

The team access their TCM solution, hosted by Tricostar, via an Internet connection. Nick explains that the advantages of a web-based system became immediately apparent, "The inevitable software niggles that any implementation involves were transferred to Tricostar and we experienced a relatively smooth start-up. Overall, I would estimate that we eliminated up to 90% of the pain typically associated with ICT implementations."

The department's team of almost sixty fee earners and support staff got to grips with using their new system. Implementation, data migration and training spanned three months.

Nick explains how TCM became embedded within the department's work, observing that it was as much about cultural change as technology, "Applying Tricostar's train-the-trainer approach, we were able to cascade training across the team and bring all our users up to speed, adjusting the training to meet individual

proficiency. We then introduced functionality gradually, starting with time recording, adding the calendar, and so on."

The benefits

Using the TCM system has brought measurable cost-savings. With TCM being completely web-based and hosted externally, it costs just 30% of what it would cost to have the system installed on the Council's network.

Nick confirms, "By opting for an externally hosted service, we saved £50,000 at start-up and have saved £10,000 to £15,000 every year since in on-going support. If we'd had to load a new software system onto our own network and servers at Ealing, all the support for that data would have had a cost. We'd have incurred a high implementation charge, as well as annualised costs for ongoing support from our ICT service providers."

TCM supports the day-to-day work of the department, such as opening and acknowledging new matters, using the calendar to note court dates, reviewing files and recording time spent.

However, rather than simply retrospectively recording how the team has spent its time, TCM provides information that enables managers to detect trends, so that they can plan



resources to handle the complex and heavy workload and identify the likely sources of future work volumes.

In this way, for example, the department has been able to recognise that criminal prosecutions for environmental crimes such as fly-tipping have been escalating, whereas right-to-buy sales of housing have been declining.

Nick comments, "To some extent, these trends are what one might have expected in the current economic climate, but they enable us to back our hunches with real data, to sort perception from reality, and then question whether our processes enable us to carry out the work in the most efficient way."

TCM also enables managers to identify areas where work might be devolved in order to reduce the Council's costs. It may be that routine tasks can be confidently referred back to the departments, leaving highly trained legal experts to concentrate on the work that demands their knowledge and experience.

Nick says, "In the important area of child protection, for example, we have analysed whether the high cost of involving the Legal team could be reduced by providing client departments with additional training in certain procedures."

The system also provides valuable data on the work of individual members of the team to support performance management.

Using a hosted system means that Tricostar is responsible for regularly backing up the team's data off-site and maintaining a resilient IT infrastructure. This again frees internal resources to concentrate on core responsibilities.

Remote hosting also enables users to access TCM from any internet access point worldwide, and Nick successfully tested this capability from an internet cafe in Sichuan, a province in south western China. It is expected that remote and flexible working will become the norm for the service during 2011/12. This will form part of the Council's major IT investment programme, when TCM will become the core system for Legal Services.

The success of TCM in supporting the Legal team's work and the demonstrable financial benefits it has brought have been replicated within the Council's Highways Management and Strategic Procurement over the past couple of years. Another department is currently reviewing how TCM could assist their work.

The future

The next challenge for TCM is to support a transition to electronic filing, whereby the system will become the core repository of important documentation. Rather than having to search through filing cabinets, documents will be created, saved and emailed through the system. Associated checks and balances, such as file review

forms and quality and status sheets will be attached, so that the complete picture on a case will be easily but securely accessible on screen.

While TCM has been working with the Council's corporate Novell email system, the team is now looking to take advantage of the Microsoft Outlook tools TCM supports by adopting Outlook as its email system next year. Ealing Council's Legal team knows it can continue to depend on its Sage Business Partner. As Nick says, "Tricostar always support our ambitions and advise us on ways to improve our usage of TCM. They are proactive in developing new functionality to further increase our efficiency and productivity."

Solution overview

- Technology which support the Legal team's approach to cost-savings and efficiency.
- Financial savings, from start-up onwards.
- Web-based access to a hosted system eliminates reliance on the Council's ICT resources.
- Analysing historic information provides a firm foundation for planning resources.
- Dependable, proactive support from long-term Sage Business Partner Tricostar.



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