

# Liss Gulhane Innes tackles Conveyancing challenges using Eclipse Proclaim<sup>®</sup> Case Management



E C L I P S E

Liss Gulhane Innes was founded 25 years ago as a 'breakaway' from an established Essex practice. From humble beginnings, the firm has grown to be a key provider of high-street services, with particular strength in residential conveyancing. Its client list includes a healthy split between private conveyancing and work for estate agents and 'panel' organisations.

Jeremy Kotze has overall responsibility for the firm's IT, and for rolling out desktop solutions to the firm's 30+ staff. He relates to us how the Liss Gulhane Innes approached the growing requirement for IT...



## ***What prompted the practice to look at technology solutions?***

Growth has always been a key watchword for us – without looking to the future, stagnation is always a very real risk. We had historically always used manual systems to progress caseloads, but with the advent of e-conveyancing, Home Information Packs, etc we really did have to put in place the right technology to embrace the 'e-conveyancing' era.

In conveyancing, where 'profit per case' is continually being pushed down, the emphasis is on productivity and efficiency, and IT is vital in driving this.

## ***How was the initial selection process made?***

In my previous life I had been through a similar exercise, so reaching a shortlist of potential software providers was a quick decision. We wanted a case management system flexible enough for us to be able to tweak, but designed in such a way that we did not have to reinvent the wheel. One of the big differences we see between service providers is in quality of delivery and after-sales support. We were working off a very low technological knowledge base and did not have in-house "techies" who we could turn to. Consequently, we had to be very certain that we could trust implicitly whoever we were going to deal with. My enquiries started with the Law Society's Software Solutions Guide, and I went on to speak to several local (and not-so-local) firms for honest recommendations. Eclipse and the firm's Proclaim<sup>®</sup> Case Management software stood out as both having an excellent record of meeting sales promises, and being able to fulfill our functional requirements.

## ***What effect has Proclaim<sup>®</sup> had on your day-to-day case handling?***

From the moment we chose Eclipse, it has genuinely been a good news story. The tools at the disposal of our case handlers mean that cases can be progressed much more smoothly, with clear 'milestones' and checklists to ensure that nothing is overlooked. As Proclaim<sup>®</sup> is a very straightforward system to use, we have been able to increase our conveyancing team over the past few months without having to bring in extra support staff – there is no need for dictation or administration, as the software takes care of all document production and task allocation.

***PTO...***

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### ***How does Proclaim® affect your relationships with business providers...?***

In addition to aiding internal efficiencies, tools like Proclaim®'s automated reporting show us in a very positive light with our case referrers! For example, we have a relationship with one estate agent who requires an update report every Monday morning at 7am. Using Proclaim®'s 'ATM' (Automated Task Manager), we have been able to set this up so that the firm receives its report, produced automatically by Proclaim®, exactly when it wants it! Very impressive.

FileView – Proclaim®'s online case tracking tool is also an extremely good offering to have in our portfolio. Using FileView, private clients and estate agents can securely view live case data via our website (which was also created by Eclipse). Despite the increase in volumes of work we have experienced, our telephone switchboard has seen no rise in the number of calls – it really does cut the number of “what’s happening with my case(s)...?” update calls!

### ***How do you see your business developing in the future, particularly in regard to the changing face of Conveyancing?***

Well, FileView has been a big seller with estate agents who want quick access to case progression data – in fact, word has spread and we recently had the unusual experience of an agent approaching us to do their work, and not vice versa!

A focus on a technologically sound and efficient service is key to our future – with the advent of e-conveyancing and the increased competition in the marketplace from potential new entrants, we see working with estate agents and other case referrers as being of great importance. Maintaining an impeccable standard of work despite an increase in volumes is the aim, and we would not have been able to consider this without the benefits of Proclaim®'s file import / export and web integration features. We can receive electronic instructions from our referrers, and can link in with provider websites to ensure that we continue to cement efficient and mutually beneficial relationships with our business partners.

Home Information Packs (HIPs) are of course next on the agenda, and our investment in Proclaim® means that this change to the market will not hinder us. We are in advanced discussions with a number of HIPs providers, who will be able to integrate with Proclaim® so that the sharing and updating of data will be seamless. In addition, Proclaim® itself can be used to create and distribute the HIP, so we already have good working options in plenty of time for the June 1<sup>st</sup> 2007 deadline!

**All in all, Proclaim® has given us an excellent platform to both expand and to thrive under the new era of e-conveyancing.**

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