



Employees at U.K. Law Firm Better Manage Customers with Client-Centric Dashboard

Overview

Country or Region: United Kingdom

Industry: Professional Services

Customer Profile

Law firm Wragge & Co, based in the United Kingdom, provides legal advice in multiple areas, including corporate finance and human resources.

Business Situation

The company wanted to deploy a portal environment that consolidated data from line-of-business applications. This would help employees develop relationships with customers and increase efficiencies.

Solution

Wragge & Co rolled out Microsoft® Office SharePoint® Portal Server 2003 with Microsoft SQL Server™ 2000. It integrated the applications and portal using Handshake Software technology.

Benefits

- Consolidated data.
- Efficient report generation.
- Employees focused on innovation.
- Improved employee support.
- Excellent integration.

“The information the Client-Centric Dashboard gathers would have required an experienced user to produce five separate reports and perform 15 separate searches across six line-of-business applications in the past.”

Andy Stokes, IT Architect, Wragge & Co

Employees at law firm Wragge & Co, based in the United Kingdom, have ensured the company’s successful growth through a commitment to customer service excellence. To help legal professionals deliver the most relevant advice and develop customer relationships, the company wanted a Web-based solution offering a single view of data from multiple line-of-business applications. The company chose to roll out a portal built on Microsoft® Office SharePoint® Portal Server 2003 and using Web Parts from Handshake Software. Since deployment, employees have gained an intuitive, user-friendly technology that helps provide a better service to clients and improves internal operations. Legal professionals, for example, can compile information rapidly, freeing up more time for managing client accounts. The company now plans to upgrade to Microsoft SharePoint Server 2007 to provide workers with Web 2.0 features such as wikis and blogs.



Situation

Achieving and maintaining customer service excellence is crucial in any business success story. To meet clients' high expectations, employees need to react quickly to changing demands. Such flexibility, however, depends on individuals having continual access to key business information.

Law firm Wragge & Co, based in the United Kingdom (U.K.), has achieved success by working closely with clients and being responsive. Quentin Poole, Senior Partner, Wragge & Co, says: "In today's marketplace, being good lawyers is just not enough. We give more relevant advice, do more than you'd expect, and work with customers in true partnership." The philosophy has certainly been fruitful. The company has offices in the U.K., Europe, and Hong Kong and more than 400 qualified employees, including 110 partners.

The company looked to create a Web-based portal to consolidate data from multiple line-of-business applications. A centralised location of this kind provided a great opportunity to develop customer relationships while delivering significant internal efficiencies. In client meetings, for instance, lawyers could go online, connecting securely to the portal, and gain instant access to customer data to deliver reports. Employees would also raise customer satisfaction levels while gaining the type of information they need to react with innovative solutions.

In addition, the ability to generate reports instantly using the portal would take some of the workload off internal reporting teams, responsible for compiling client reports in the past. It would leave them more time to focus on higher-value, strategic roles.

Andy Stokes, IT Architect, Wragge & Co, says: "We had the idea of creating a dashboard showing client information within a portal

environment. We needed a technology that would provide a complete, integrated online view of all these applications. In addition, Wragge & Co wanted a solution flexible enough to evolve with continued developments around portal technology."

Solution

A review of the marketplace highlighted the business value of Microsoft® Office SharePoint® Portal Server 2003. The portal technology provided the opportunity to consolidate all line-of-business data in a centralised, Web-based location. At the same time, existing third-party vendor Handshake Software offered an out-of-the-box, toolkit-based solution to integrate line-of-business applications efficiently in a SharePoint Portal Server environment, with Microsoft SQL Server™ 2000 as the database.

Stokes says: "SharePoint Server delivered the consolidated view we wanted, and integration would be straightforward using the Handshake Software solution. It also aligned well with our existing IT enterprise stack, based on Microsoft technology."

The continued development of Microsoft solutions such as SharePoint Portal Server and Microsoft SQL Server was important for Wragge & Co. It provided a clear roadmap for giving employees more support in developing client relations and improving operations. Stokes says: "We were aware of the development of Microsoft SharePoint Server 2007 and the combination of Web 2.0 tools such as wikis and blogs—features that could strengthen our customer servicing."

With plans to deploy Microsoft SQL Server 2005 in the coming months, the company also saw an opportunity to develop reporting efficiencies further. Stokes says: "The integration between SharePoint Portal and the Microsoft SQL Server 2005 Reporting Services is excellent. The Reporting Services

solution will ensure we can manage our data more effectively with real-time data analysis. The Handshake Software solution also integrates with Microsoft SQL Server 2005 Reporting Services to present this data.”

The finished portal, known to employees as the Client-Centric Dashboard, went live in mid-2006. Stokes rolled it out to client service managers, who need ready access to client data. Taking advantage of the Web Parts from Handshake Software for SharePoint Portal Server, users gain line-of-business data in multiple formats such as lists, panels, and graphs. Plus, with a tabbed user interface, they can move easily between Web pages.

Benefits

By combining Microsoft SharePoint Portal Server technology and Handshake Software Web Parts and technologies, employees at Wragge & Co have a Web-based environment that delivers a comprehensive view of client data. This one-stop-shop for line-of-business information, presented in a variety of compelling formats, ensures workers are more productive.

Employees Gain Consolidated Data

With the portal solution, workers gain instant access to customer data to make better business decisions faster. Derek Southall, Partner and Head of Strategic Development at Wragge & Co, says: “We continually need to raise the bar in relation to client care. The real strength of the Client-Centric Dashboard is that it pulls all of the key customer information we need into one place and automatically updates it.

“It makes it very easy to monitor the work we are doing for a client. The resources we save can be focused on spending more time thinking proactively about clients’ issues. More effort can go into adding value rather

than the mechanics of assembling and updating key information.”

Workforce Increases Innovation

The time saved using the dashboard in compiling information is time that can be used to work on new, innovative ways of supporting clients. Today, employees have regained significant parts of their working days previously dedicated to retrieving information.

Stokes says: “The information the Client-Centric Dashboard gathers would have required an experienced user to produce five separate reports and perform 15 separate searches across six line-of-business applications in the past.

“A manual operation would take at least 30 minutes, plus time needed to consolidate information. The dashboard, however, gathers and presents the information in seconds. As a professional services organisation, we are delighted the time saved can be put to more profitable use.”

Improved Operations for Boosted Services

Wragge & Co plans to take advantage of SharePoint Server 2007—the latest version of the portal technology—in the coming year. By choosing a Microsoft solution, Wragge & Co knows future IT investments will integrate easily with the existing environment, while offering the latest business tools to enhance productivity.

Andrew Trickett, Knowledge Management and Compliance Manager at Wragge & Co, says: “As a part of the knowledge management strategy for Wragge & Co, SharePoint Server 2007 will provide us with wikis and blogs we can use not only to help people collect and search for information, but connect—either in a project space or as a means of setting up informal groups to cover a range of work issues.

For More Information

For further information about Microsoft products and services please visit www.microsoft.com/uk

or call 0870 60 10 100*

For hearing impaired customers with a Minicom contact: 0870 50 30 400*

*Lines are open 8am-6pm Monday to Friday. Please note Numbers prefixed 0870 will be charged at national call rates. For details of national call rate charges please contact your telecoms provider

For more information about Handshake Software products and services, visit the Web site at: www.handshakesoftware.com

For more information about Wragge & Co products and services, visit the Web site at: www.wragge.com

“Enhancements in SharePoint Portal Server provide a company like Wragge & Co with a reliable and well-supported product, which integrates with our existing applications and is fundamental in helping us deliver our knowledge management strategy.”

Intuitive Business Tools Reduce Training

With the portal combining easy-to-use and familiar desktop applications from the Microsoft Office system, the new solution was adopted rapidly. Employees required minimal training to make the new environment a prominent feature in their daily working lives. For Wragge & Co, this avoided significant costs.

Stokes says: “For the legal profession, where working time is precious, it’s difficult for people to dedicate time for training. Anything that’s easier for individuals to understand and use is a bonus for law firms.”

Microsoft Server Product Portfolio

For more information about the Microsoft server product portfolio, go to: www.microsoft.com/servers/default.aspx

For more information about Microsoft Exchange Server, go to: www.microsoft.com/exchange

Software and Services

- Microsoft Server Product Portfolio
 - Microsoft SQL Server 2000
 - Microsoft SQL Server 2005
 - Microsoft Office SharePoint Portal Server 2003
 - Microsoft Office SharePoint Server 2007