

Mini Case Study



Partner in Practice Shulmans take Partner for Windows to another level

Jeremy Shulman realised that achieving success would take more than just hard work and determination; his business had to go further. Shulmans had one main objective when selecting its new case management system; it had to be versatile enough to grow with the practice.

Overview

When Shulmans Solicitors was founded in 1981 by Jeremy Shulman he 'realised that achieving success would take more than just hard work and determination; his business had to go further'. It should therefore come as little surprise to discover the practice has not only successfully implemented TFB's premier flagship product Partner for Windows, but has taken the software solution to another level.



Partner at Shulmans

As a firm which has built up a highly prestigious commercial practice, working on a national and international basis, Shulmans had one main objective when selecting its new case management system; it had to be versatile. This, in turn would give the firm infinite opportunities to tailor software solutions to its own specific requirements thereby enabling Shulmans to meet the expectations of its own clients. Almost two years on from 'go live' Partner for Windows has enabled the practice to achieve its mission. The journey has seen Shulmans invest consistently along the way, constantly striving to pave the way for further innovations which will enhance the development of this forward-thinking practice. Shulmans was one of the first firms to employ the automation and alerting system Partner TaskCentre which is fully integrated into TFB's Partner for Windows solution and is now cited as one of the most proactive management tools available. Used to assist in co-ordinating the practice in a variety of areas it has been adapted to automatically notify individuals firm-wide of information essential to maintaining a proactive approach.

Such advantages include:

- Unit heads receiving a summary each week of matters opened by fee earners in their unit including a cost estimate total.
- Unit heads receiving a daily email of fees delivered by each fee earner and how that compares to monthly targets.
- Notification received by the fee earner of a matter opened without a cost estimate.
- Use of the system to sit across other databases such as digital dictation (also available from TFB). For example it will send out an email to relevant units notifying them of an urgent dictation that has remained untyped for over an hour.
- When exchanging contracts, TaskCentre scans the datafield in case manager and sends a text to the client which includes the completion date.

Most recently Shulmans has focused its attention towards the way its clients access information about a case. Using a variety of media including Web, text and email, the practice's transactional conveyancing operation has placed the particulars of a case at the client's disposal. From the moment a client contacts Shulmans high volume conveyancing offshoot, QCAS (Quality Control At Shulmans), he is given a choice of methods by which to communicate for the duration of the file.

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Partner for Windows enables the communication method parameter to be set up from the outset ensuring each client receives information regarding his case in accordance with his own preference. But perhaps most excitingly QCAS has launched an automated telephone service enabling its clients to call the practice day or night and acquire the most up to date information about an individual case quickly and most importantly, securely. By inputting a unique code clients can ascertain the position of a file and at what stage it has reached, all at 'the touch of a telephone'.

Jeremy Shulman, Founder and Chairman comments:

'We are keen to be a law firm at the forefront of technology and provide our clients with a service that meets their expectations. Partner for Windows has provided us with a sound foundation offering the reliability, continually enhanced functionality and perhaps most importantly the flexibility to mould our system into one that provides the most advantages to users and clients. The latest development of QCAS is one example of how a quality product such as Partner for Windows can be adapted to fulfil a wide range of needs which will encourage our clients to benefit directly from the leading software solution we have.'



Notes:

TFB is one of the most progressive IT suppliers in the legal market place. With over 28 years experience and knowledge, TFB is a specialist within the legal sector. The company is distinguished from the competition by providing an impressive range of legal software solutions and services, backed by the highest standards of customer care. TFB is a financially stable and growing company, and has a clear vision of its market position in the coming years.

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