

Preparing for CCMS...

We are keen to embrace the latest standards, particularly those that take advantage of IT, to ensure that we operate at maximum efficiency.

We prepared and circulated documentation along with a brief to detail who was doing what in terms of responsibilities: solicitors have the role of completing and understanding the applications; accounting staff the role of billing / POAs.

We gave access to fee earners, rather than everyone in the family department, so that they could understand timescales and the detail of what was required. In other words, we restricted access until people were confident and comfortable with the system.

“CCMS is in line with our policy of using technology to help our processes and make the firm more efficient. It’s easy for staff to use and understand, it’s on the desktop and staff can login anywhere.”

Training staff...

We ensured staff completed the (LAA’s online) training modules. Staff were advised on roles and asked to focus on those roles when completing the training. We downloaded the LAA’s quick guides and placed them on our intranet which all our staff can access from their PC.

We completed in-house training on CCMS applications and our office manager became the point of contact for queries.

Due to incorporating another firm at the time we considered CCMS we completed the incorporation before rolling CCMS out to our staff. Everyone therefore benefited from the change. Frequent use by fee earners will make it more likely that they retain information on how to use CCMS.

“Training was balanced to ensure all relevant staff obtained an overview of the system and detailed knowledge where required. We have not needed to complete refresher training as continued use of the CCMS system assists with retaining knowledge.”

Dealing with issues...

The two-stage process in Payments on Account feels more long-winded – we feel the eForm system is better – so we save the invoice to the desktop to make it easier to upload when moving to stage 2.

We needed to contact the LAA about a refused application, even though the status had changed, so we now monitor the status of certificates to check this doesn’t happen again.

[Please read the LAA’s response in the footnote.]

Working with clients...

Currently, we complete CCMS applications with the client present. Fee Earners have iPads and/or Smart Phones and laptops so are able to manage interviews with clients who can’t attend the office.

Managing notifications...

Our office managers in Scunthorpe and Hull can access our notifications, however it is the primary responsibility of each individual fee earner to review their notifications.

Technical questions...

We use Internet Explorer. Everyone has a PC or laptop and fee earners have iPads and/or iPhones. In terms of billing, our software vendor is Law Fusion.

If you could change one thing?

Remove the two-stage process across the whole system.

[Please refer to footnote.]

Improvements and benefits...

One advantage is being able to see what LAA has actually received – rather than chasing paper applications. It is quick and simple and one less thing that we need to send out on paper. Payment is also much quicker.

“CCMS will help with cost control as it is very clear. Allocating costs to counsel will also provide a better overview on costs.”

Advice to other firms...

The impact on our internal practices was minimal. Our partners made a decision to become a paperless office as soon as possible. Therefore, we wanted as many processes available on our case management system. Using IT for this process is one more step to achieving this objective.

“Make sure you have time when submitting your ‘first’ application, read everything you get from the LAA, complete the training, download the quick guides, read them and you should be in a position to proceed.”

Footnote:

We believe that firms that have adopted CCMS early on have had the opportunity to adapt internal processes to drive maximum efficiency within their business. In relation to the two-step process, this would require a fundamental redesign of CCMS but we are continuing to investigate enhancements that may simplify the process.