

# CASE STUDY



## Lean on Keyhouse

**O'Reilly Thomas LLP Solicitors brought in Keyhouse before embarking on a Lean-based business process improvement drive**

### Background

O'Reilly Thomas LLP Solicitors is a law firm based in Drogheda, Co. Louth. For over 30 years they have provided a full range of legal advice and legal services for both business and private clients. Having advised and helped thousands of clients in property transactions, personal injury claims, medical negligence, wills, family law and more, they are acutely aware that clients want the best solicitors with personalised attention and reasonable rates.

In July 2020 and supported by the Local Enterprise Office (LEO) Lean for Microbusiness Programme, the firm engaged Keyhouse to work with them on a business process improvement drive to improve efficiencies in the delivery of their conveyancing services and so provide clients with a more efficient and value-added service.

Joe Thomas and Anna O'Reilly headed up the project and they were drawn to the Lean principle as it emphasises continuous improvement by creating a more efficient workplace, while enhancing value for clients.

Keyhouse worked with the firm to introduce lean principles, focussing on improving processes in the delivery of residential sale conveyances

For **Joe** and **Anna**, the goal was to further streamline their conveyancing work, taking them to the next level, enabling them to spend more time with clients, guiding them through the conveyancing process and less time on repetitive, administrative tasks. At the same time, the firm wanted to be even more client-focussed by ensuring a proactive approach to managing client files.

by optimising the use of the Keyhouse Case Management System. Keyhouse and a team from the firm collaborated to identify issues and potential improvement areas. We then provided the relevant support in terms of advice and tailored training so that the necessary changes could be made. The focus here was to ensure the firm's team had the capability and capacity to make these changes for this specific project and on an ongoing basis.



**“As a solicitor being actively involved in the Lean project from the beginning has given me a much wider understanding on the capabilities of Keyhouse in running files. We have been impressed by the knowledge this project has provided to all of us in enhancing our efficiencies on progressing files from beginning to end. From the knowledge gained we are now adapting these processes to other areas such as wills, family law and probate.”**

**Anna Murphy, Solicitor, O'Reilly Thomas LLP Solicitors**



**“We are delighted with the end project and all staff involved gained a lot of valuable information on approaching the task from the Lean perspective. We were surprised at the relevance the Lean project had to the way we approached issues or difficulties in efficiently progressing files in the firm. This has provided us now with a wider approach solving tool to everyday difficulties that arise within the firm. This project has been a hugely worthwhile exercise for our firm.”**

**Joe Thomas, Partner, O'Reilly Thomas LLP Solicitors**

## Challenge

- Although O'Reilly Thomas LLP Solicitors had implemented Keyhouse Case Management in 2018, having migrated from a UK Case Management System, the conveyancing workflows were not being used to their full capacity, even though they were there to be used. Due to an increasing volume of work, this was now creating inefficiencies for the firm in terms of duplication of actions and documents, and template documents not generating correctly.
- A further challenge facing the firm (like all law firms) was managing client expectations in terms of updates on the progress of their files. This meant staff were managing excessive emails from clients looking for progress reports.
- Another concern the firm had was that there was no real clarity on how much time it was taking to complete a conveyance, where the delays were, or its profitability.

By working closely with the firm, **Keyhouse** were able to identify problems with the current process and workflow and presented the opportunities for improvement.

- Given that this project was delivered in the midst of a COVID-19 pandemic, it necessitated that all workshops, meetings, and training had to be delivered remotely which normally would have been delivered on-site.
- There were also constraints in the amount of time the firm could devote to the project around process, workflows and coding template documents due to firm's high workload.

## Solution

By working closely with the firm, Keyhouse were able to identify problems with the current process and workflow and presented the opportunities for improvement. The firm needed to commit time to mapping the workflow again to ensure all the relevant actions and associated precedent documents were attached and generating correctly with all the required information. Follow-up actions were also carefully reviewed to ensure there was no duplication or unnecessary steps. Alongside this, the workflow was examined to see what steps could be further automated with the introduction of email templates to not only expedite the process for the client, but also introduce savings in terms of reducing printing and postage costs whilst also saving the firm valuable time.

In terms of managing client expectations for updates, automated progress reports were introduced at key stages of the file, ensuring that firm's clients are continuously kept updated throughout the case which subsequently increases solicitor's productivity.

To get an insight as to the profitability of a conveyance file, the firm implemented time recording which has resulted in better visibility on time input to files leading to more time being captured.

Delivering this project and providing the relevant supports remotely in the midst of a global pandemic was made possible with collaborating and meeting virtually by using online platforms such as GoToMeeting and Microsoft Teams.

## Result

- With the newly improved workflow for managing residential sale conveyances, the team are reporting high satisfaction with time savings and increased productivity.
- Efficiency increases of 25% in the processing and management of residential house sale conveyancing files are also reported and the firm expects that this will increase further as the new workflow is bedded down more.
- Increased efficiencies mean solicitors can now spend more time with clients on more complex and value-added work, and less time on repetitive administrative tasks.

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- Competitiveness for the firm has been enhanced too, through developing the team's capability with focussed and tailored training which is transferable to other areas of work (e.g. new developments). This in turn builds the capacity of the firm and its people enabling it to take on more work without increasing headcount.
- The new workflow also enables better task management providing transparency on what tasks have been completed on a file and what still needs to be done, enabling more effective remote working with full visibility.

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For more details, see [www.keyhouse.ie](http://www.keyhouse.ie)

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