

## Success Story: Pitmans Solicitors

Sector – Legal Practice

### Introduction

Founded over 150 years ago Pitmans is one of Reading's oldest and most established legal practices. The Firm offers a comprehensive legal service to a broad range of national and international clients, from large public companies, banks and institutions to small start-up businesses, charitable and other organisations and public sector employers. The practice employs over 200 professionals, including 131 fee earners and has recently opened an office in London.

### Challenge – New legislation, means new competition, new challenges

The introduction of the Legal Services Act in 2011 will create a new competitive environment for law practices, as it will open up the market to new non-legal entrants. Forward-thinking practices such as Pitmans have recognised that in order to retain their existing clients and build their business in the future they need to embrace strategies that are focused towards providing exceptional customer service. Finance Director at Pitmans, John Hargrave explains, *"We have always prided ourselves on our customer service, however the new legislation will increase competition by allowing new players such as Tesco to tie-in with legal professionals to provide packages 'over the counter'. This will obviously offer more choice, but it also means that established legal firms like us need to be able to differentiate ourselves. We recognised that a strategy based on introducing new technology across the organisation could form a key part of addressing this objective through the delivery of excellent customer service."*

He continues, *"We regarded our telephone communications as the heart of our business, however our 18 year old hardware based system was beginning to see the strain as we continued to expand. In a typical day we would receive between 700 and 900 calls! It was becoming increasingly difficult and expensive to add new users and there was no way we could integrate it into our core business processes. We also identified telephone communications as a critical area where we could increase both our customer service and our overall productivity"*.

Pitmans embarked on a rigorous procurement process to select a new telephony solution that could help them to give customers more responsive and tailored business communications.

### The Solution – A customer-driven telephony system that could be tailored to meet the growing demands of the practice

Pitmans recognised that since implementing their last system there had been a quantum shift in the design and development of telephony products. In a new digital world, Pitmans recognised that traditional circuit switched manufacturers were struggling to adapt their hardware-based products to embrace the flexibility and functionality offered by software based IP solutions. Hargrave comments on the selection process, *"I'd worked in the IT industry for over 20 years, and had a healthy suspicion of products that have been developed as one thing and then modified to be something else, this was my view of the current crop of hybrid hardware-based products on the market. What we needed at Pitmans was a software-based product that had been designed as an IP based telephony solution from scratch not as an afterthought"*.

He continues, *"Another important factor was that we wanted our supplier to have the same type of business culture as ourselves, one that was highly responsive and customer-focused. When Swyx reseller, **Atia Solutions** introduced us to the **SwyxWare** software based telephony solution and we were impressed by both the product and the solution provider. Swyx was server-based and did not rely on hardware and **Atia** provided us with the confidence that they had the experience and knowledge to provide the level of support and integration we needed."*

## **The Results – A more customer-focused and productive operation**

According to Hargrave and his team the implementation of the SwyxWare solution has completely revolutionised the way in which Pitmans now conducts its business. He explains, *“The key area of change is the way we now handle incoming calls. We have consolidated our receptionist activities so that calls can be answered from any location dependent on availability. Based on CLI, we can also fast-track the principals of our largest clients directly through to the relevant senior partner, without going through reception. This provides exactly what we want for the future – a high level of personal service and customer care. We can also record all calls and attach the resulting .wav file to a client record and store accordingly. This file can then be reviewed by our staff as required without the need to bother the client, if some point needs clarification.”*

*“It is also possible to direct calls according to the type of enquiry and relevant division. For example the call might be relating to ‘Property’, ‘Corporate’, ‘Matrimony’, ‘Pensions’ or ‘Insolvency’ and using simple call routing tools we can send the call to the appropriate department or individual. In some areas of our business, it is critical for us to respond very quickly. For example, a caller might need to urgently speak with someone in our ‘plot sales’ team for an immediate answer on say ‘change of use’ for a property. The Swyx system can help us achieve this.”*

Hargrave also says that the Swyx system has had an impact on the company’s ‘bottom line’. Being software-based all moves and changes can now be carried out internally by administrative staff, in the past each move required an engineer to be called out at £100 a time. For a busy practice like Pitmans, whereby it could potentially initiated 10-15 changes per month this is a major saving.

Pitmans have also enjoyed other benefits of the Swyx solution including:

- The ability to offer its fee earners the opportunity to work remotely, either from home or from another location
- To drive both its incoming and outgoing calls from Microsoft Outlook
- Using Swyx reporting tools, analyse peaks and troughs in terms of calls received so can ensure sufficient personnel available to manage enquiries
- Ability to record any missed or abandoned calls and call back later
- The opportunity to review other technology options such as future integration with its case management system
- Introduce ‘Fax to the desktop’ for instantaneous delivery and receipt of faxes to all professionals and support staff.
- Free conferencing facility included with SwyxWare particularly useful for communications between associates in different countries
- Personalised greetings according to CLI
- Ability to track and record details of missed calls, so they can call back later

## **Summary – A platform for the future**

Pitmans has aggressive growth plans and is looking to expand by around 20-30% in the next few years. As Swyx is based on a software licence model then this growth will not be restricted by any hardware limitations, according to Hargrave another reason why Swyx fits perfectly with the Pitman business model. He concludes his experience of using the system so far, *“ We have been delighted with both the Swyx solution and the support and training we have received from Atia, they have pulled out all the stops to assist us achieve our business objectives and we feel we are only scratching the surface with what we can do in the future. At present the majority of staff use handsets, but we plan to introduce SwyxIt! softphones that we expect will be particularly popular with some of the younger staff that are keen to embrace the latest technology. We are also planning to integrate Swyx with our CRM system in the near future.”*