

CASE STUDY



Managing requisitions is infinitely easier for Farnworth Rose



SOPHIE HOLDSWORTH
Operations Manager, Farnworth Rose



Lancashire-based Farnworth Rose Solicitors has been an advocate of digitising the conveyancing process since 2015. Sophie Holdsworth, Operations Manager, discusses how they created a game-changing conveyancing workflow by integrating InfoTrack with their case management system, Osprey.

Integrating InfoTrack and Osprey has positively impacted Farnworth Rose Solicitors by:

- ▶ Automating the flow of information between systems to save time and reduce risk
- ▶ Creating a consistent process across the firm
- ▶ Saving up to 45 minutes per transaction on post completion
- ▶ Creating new opportunities for staff development



Farnworth Rose Solicitors prides itself on ensuring the right people are matched with the business to deliver expertise and top-notch service to clients. Covering practice areas including residential conveyancing, commercial property, family, employment law, litigation, and wills and probate, the firm advocates implementing the best digital solutions to help get the job done.

Operations Manager, Sophie Holdsworth shares insight into how powerful adopting the right technology has been, including leveraging the integration between InfoTrack and Osprey, their case management system (CMS). From optimising workflows through tailored approaches to maximising automation to free up fee earners time and provide new opportunities for senior support staff, we explore how Farnworth Rose Solicitors is making the most of InfoTrack via the Osprey integration.

Less risk, less time with InfoTrack and Osprey

“Finding out InfoTrack integrated with Osprey was a game-changer for us and spurred us on to give InfoTrack a go. We were already aware of some of the main features and had been working on digitising the conveyancing process, so it seemed like a no-brainer after learning it integrated with our CMS,” shares Sophie when asked what influenced their decision to choose InfoTrack as their conveyancing services provider.

“We work hard to constantly improve the conveyancing process for both our clients and staff, and the more automation and digital solutions work together, the more it helps us to achieve our goals,” she continues.

Farnworth Rose opened doors with Osprey in place as their case management system in 2007. Having begun the journey of digitising their conveyancing process in 2015, they were looking for a way to create synchronicity in their workflow. That’s when they sought out integration between Osprey and InfoTrack in 2021.

“We wanted to standardise our workflows and create consistency across the firm, making sure that each department, and residential conveyancing in particular, runs in a uniform way. A way that aligns with the firm’s culture and values, and of course improving efficiencies, is always crucial to us,” she says.

One of the firms’ values is to continually look for ways to improve how they work with the right tools, creating efficiency throughout the process. Pre-populated data, automatic return of documents from InfoTrack into the matter in Osprey, and the reduction of risk that comes with this automation has been a massive benefit for the team at Farnworth Rose.

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Efficiency every step of the way

It's the efficiencies and time savings that are having the greatest impact for Farnworth Rose. With data already being inputted into Osprey at several stages of a transaction, the firm is saving approximately 30-40 minutes per matter across post completion and reporting to the client.

The integration means any data linked to a matter in Osprey will pre-populate into the forms in InfoTrack, reducing the risk of errors and saving time not having to duplicate information. Ultimately, no one is left asking 'have I saved that to the file?'

It's not only the integration that benefits Farnworth Rose though, the firm is also seeing the benefits of using the industry's digital AP1 solution of choice too. InfoTrack's AP1 dashboard makes management of registrations easier according to their post completion team.

"It's easy to access all the outstanding requisitions and to keep on top of the applications on the easy-to-read dashboard. The filtered options are much more convenient and everyone else can see what's going on, what's been submitted, and where an application is at without having to request an update from the team. The instant messaging system makes it a million times easier to manage requisitions too," says Sophie.

The flexibility to tailor the technology to create structure in the firm also supports its compliance responsibilities. The elimination of missed information has reduced risk and helped the firm adopt best practices across the whole department.

"Using InfoTrack and Osprey allows the department to work in a structured, uniform way that also helps us to train up junior members of staff because we've got a set process. Being able to say, 'this is the technology that we use and this is what it does for you' is supporting our CQS and Lexcel responsibilities," Sophie tells us.

"We really do feel that InfoTrack tailors the service and products for our needs, which is so important. InfoTrack always listen to our feedback, and often even request it. And they act upon it," she adds.

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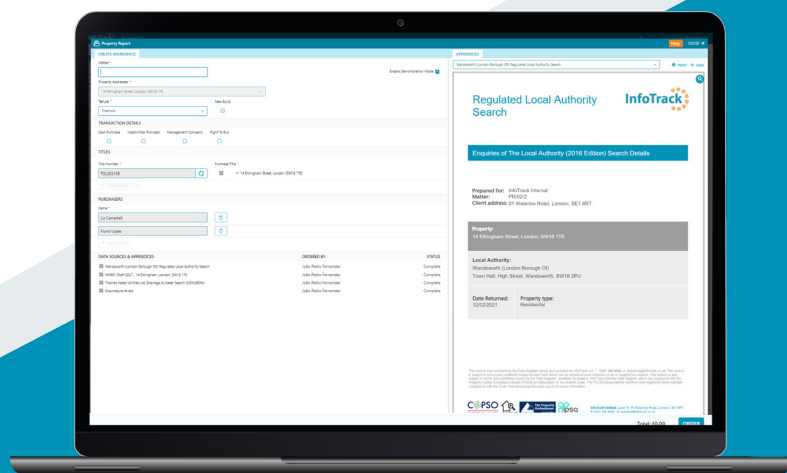
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New opportunities and improved talent attraction through digital

The time savings the integration is providing have created new opportunities for staff across the firm. Fee earners can spend more time putting their legal expertise to use and managing client relationships, while senior support staff are given new opportunities to develop their skills.

The biggest opportunities have been generated in relation to using Property Report to create client-friendly, professional looking title reports.

“Property Report allowed us to involve senior admin support staff who support fee-earners one-on-one in the process. For example, they might start a Property Report with all the standard wording and information from within InfoTrack, which is then passed over to the fee-earner for them to review, complete the more complex areas, and then finalise. It’s saving fee earners time while providing new training and development for other staff,” says Sophie.



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Building return business with better service

More than 55% of Farnworth Rose's client base are returning clients. The firm attributes this success to aligning the right people and expertise with their clients' expectations and excellent service delivery.

Sophie explains, "Most clients these days are looking for a digitally focused firm. It's the way that everybody wants to work now, so it's always a big attraction to them. Digital also makes us a bit more environmentally friendly too. We're not running off reams of paper, not sending things in the post every night. So that's not only a massive saving for us but reduces our carbon footprint too."

Using the right technology has created an environment that nurtures client relationships by giving fee earners more time and makes the process more accessible for their clients too. Always open to trying new digital solutions that can enhance the experience of all parties, Sophie says any tool that can save them time, create opportunities for training and development, and give their clients a better experience is worth trying.

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"As soon as any kind of new technology comes on the scene, we're always keen to have a look to see if it will fit with us and how we work. For most clients it's the ease of being able to do things on the go. Time is precious; now they don't have to come in and see us. They can do things from their mobile, which obviously makes life a lot easier for them," she adds.

The final word

Sophie says the team at Farnworth Rose Solicitors are thrilled with the improvements resulting from integrating InfoTrack and Osprey. When asked why, she tells us, "It's the efficiencies, the reduction in risk, time saving, and it helps with training and development. We are constantly striving for improvement and InfoTrack and Osprey both seem to have this same mindset. They are both great companies to work with."

Transform your conveyancing workflow with
CMS integration. Find out how today.



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