

Stockton-on-Tees Borough Council reduces costs with a customized version of Sage CRM



Customer

Stockton-on-Tees Borough Council

Industry

Government

Location

UK

Solution

A customized version of Sage CRM

Stockton-on-Tees Borough Council provides a wide range of services to a thriving area of the Tees Valley. Over 186,000 people live and work in the Borough's towns and villages.

The Legal Services team supporting the Council's work handles a wide variety of matters every year. It has received recognition from the Audit Commission for delivering best value, and it is committed to achieving high standards.

The challenge

The Legal Services team had been using a basic time recording system. This provided limited information and had reached the end of its useful life. In drawing up specifications for a replacement, the department extended its requirements beyond time management.

Julie Grant, Head of Legal Services, explains, "We need to be able to demonstrate value for money in providing services. To achieve this, we must know that our time and people are

being deployed cost-effectively and where they will have most impact. In the past, we could record where our team's time had been spent; however, we could not use the system to plan resources and identify efficiency savings."

The solution

In early 2008, the Borough's ICT team helped the department to draw up a list of six potential providers of a new system. In the end, the Borough chose TCM (Timebase Case Management) from Tricostar.

Julie says, "Tricostar offered the best fit to our specification and, from the demonstration, seemed to be quite intuitive and logical to use. This was a major factor in our decision; TCM looked the easiest and most user-friendly of the systems we reviewed."

Challenge

The Legal Services team had been using a basic time recording system that provided them with limited information. They needed a solution that would fulfil their requirements beyond time management and demonstrate value for money in providing services and give them the ability to plan resources.

Solution

Sage CRM was customized to include TCM (Timebase Case Management) and it was also integrated with Microsoft Outlook. The implementation has resulted in an essential detailed management tool for the Borough and

has allowed them to monitor the time, level of service and cost implications involved with a matter.

Results

The implementation of Sage CRM has not only improved time recording, it has built up a knowledge base that is visible to all staff, allowing fee earners who are taking on a new category of work to get up to speed more rapidly. The time spent on the manual administration of documents has decreased, allowing more time to be spent on cases and increase productivity.

‘Court Bundling has been a godsend. Without it, we couldn’t have coped with the workload and would have had to employ more fee earners.’

Julie Grant, Head of Legal Services,
Stockton-on-Tees Borough Council

The Borough purchased TCM (a customized version of Sage CRM).

First impressions of TCM proved well-founded, according to Julie: “Thanks in great part to support from Tricostar and the work they did behind the scenes, the transition to the new system was quite seamless and our fee earners and clerical staff took to it very quickly. One day for implementation; some training in its use; and off we went. The team could readily see how TCM would make their jobs easier.”

The system is integrated with the Borough’s Microsoft Outlook applications. Fee earners are able to file emails against the correct case at the click of the button, as well as being able to use Sage CRM completely within the Microsoft Outlook interface.

The benefits

Since its implementation, TCM has become an essential management tool. Julie says, “We can monitor the time and cost of the people involved in a matter and, in analysing the work coming in, build up a picture of trends. This enables us to devise a more accurate service plan. In the past, we might have had a feel for what was happening in terms of workload trends, for example identifying a rise in child protection cases. Now, we have the detail to analyze whether employees are effective in their roles and are providing the right level of service.”

Julie says TCM contributes to performance management too. “At appraisal time, managers can view an employee’s case-load and compare it with that of other team members.”

However, it’s not just improved time-recording which has brought such value to the work of the department. TCM has created an electronic filing system which stores matters under different ‘work types’, for example ‘highway agreement’ or ‘right to buy’. Using the work type as a search term, staff can then find previous examples of the matter in hand.

“We’ve been able to build up a knowledgebase of precedents on TCM, which is visible to all members of staff.

This means that fee earners taking on a new category of work can get up to speed more rapidly, as they have all our combined experience to draw on.”

The service has been improved, too, “We have a centralized store of information, which is invaluable in enabling us to instantly put our hands on details relating to current matters.”

About a year ago, Stockton Legal Services added Timebase Court Bundling, and Julie is enthusiastic about the difference this has made in reducing the manual administration of documents associated with cases.

She says, “Ensuring that the right documentation is in place is ultimately the responsibility of our solicitors. Now, with Timebase Court Bundling they can feel confident delegating this task to the clerical team and devote more of their time to the issues that need their skills and expertise. Their confidence in electronic court bundling has grown and grown – I don’t think they’d ever want to take the job back!”

Templates and wizards make it easier to set up bundles, while the contents, index and page numbering are all updated automatically with every document change. “Even just having automatic pagination has saved a lot of time,” says Julie.

Everything is tracked electronically, while having a full, coordinated electronic document means there is always an accurate master document. And if pages are removed at court, no time is lost having to search for them.

The future

The department's commitment to increasing efficiency has become even more important in the current economic climate. Julie is planning to utilize the additional support TCM can provide, "With the pressure on local government budgets, we don't have the facility to increase our physical resources. Therefore, we have to do everything we can to increase the speed, accuracy and consistency of our work. Introducing workflow management through TCM will help us to achieve this. Tricostar have offered to come in and help us to get started."

The Tricostar team continues to provide responsive support. "They're really excellent and it's very reassuring to know they're there. If ever there is a problem – fortunately rare – they grasp it very quickly and do everything they can to find a resolution without delay," says Julie.

"Another good thing about Tricostar is that they always seek suggestions for the future development of the system and act on our feedback."

About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at www.sagecrm.com

