



## HOW A FIRM LEVERAGED OFFICE 365 TO AUTOMATE CUMBERSOME PRACTICE PROCESSES

### DUNDAS LAWYERS - CASE STUDY

#### OVERVIEW

Dundas Lawyers was frustrated by the amount of time being spent on task follow up and email communications internally. They were wasting time by manually assigning tasks by sending emails and adding follow ups in multiple places and using multiple external systems such as Asana. Based on an incremental development process ServiceScaler developed custom workflows in Office 365 to deliver a systemised solutions for task and process management.

#### BENEFITS

With the implementation of ServiceScaler's Office 365 workflow solution, Dundas Lawyers has visibility and transparency over certain tasks and workflow. Moreover it has keeps various statistics where none were previously available. There has been a reduction in the number of emails being circulated and there is now consistency in tasks and processes that are being performed. This has led to a reduction in non-billable administrative tasks being completed by lawyers so they can focus on client services.

*"Tasks that used to take 15 minutes plus 3 backwards and forward emails can now be completed in just 5 minutes. Things have been automated and it's our clients reaping the benefits of our evolution."*

**- Malcolm Burrows, Principal  
Dundas Lawyers**

#### PROBLEM

Dundas Lawyers challenge was that their practice management system lacked the capability to easily assign, action, manage and report on tasks within the practice – despite all sorts of promises to the contrary. It also didn't provide certain key information that they wanted at our fingertips. Certain key features simply didn't work for their practice as they were geared to family law or conveyancing.

#### SOLUTION

ServiceScaler worked with the Principal of Dundas Lawyers to identify process improvements that could be addressed using Office 365 to build a bespoke solution. By combining the capabilities of SharePoint, Planner, Forms, Office and various plugins, ServiceScaler was able to configure the 365 applications to simplify and automate various key workflows that the firm wanted to measure.

#### RESULTS

- Centralisation of systems to a singular customisable interface;
- Didn't need to procure new software;
- Able to use the system itself as a technological advantage for clients;
- Ability to assign, prioritise and track tasks as they are completed without having to go to a separate task management system.