



# Enhancing the Mobility of Lawyers Coulter Roache Lawyers

## The Client

### **Wes Heywood**

*IT Manager, Coulter Roache Lawyers*

Coulter Roache Lawyers is a leading regional law firm based in Geelong and surrounding areas. Operating for more than 70 years, the 65-person firm offers a wide range of legal services including corporate and commercial law, family law, litigation, dispute resolution, property and development, and succession planning.

## The Challenge

Coulter Roache Lawyers have been using Lexis Affinity™ for the past four years, enabling their lawyers to concentrate on legal work and not waste time on account and file management. Over this period, work practices and client demands have changed, requiring more mobility and increased collaboration; and Coulter Roache Lawyers looked to LexisNexis to provide upgraded tools to support these changes, as well as continue to increase efficiency and productivity at the firm.

“In the three years that I have been working with Coulter Roache Lawyers, I have seen a change in how technology is used by our staff and an increased expectation on the lawyer to work wherever they may be – whether

it’s at home, in court or visiting clients,” explains Wes Heywood, IT Manager for the firm.

“In addition, with the introduction of flexible working practices, and so many lawyers working off-site, having accurate and current electronic files to replicate paper files has also become a paramount need. This is from a risk perspective, as well as in relation to improving staff productivity and collaboration, such as the ability to record time and fees remotely”.

## The Solution

The LexisNexis Practice Management team invited Coulter Roache Lawyers to become part of the Steering Group for Lexis Affinity 6.0; a system upgrade focused on offering legal firms secure, easily accessible and device-agnostic mobility, as well as improved Microsoft® Outlook integration features.

Coulter Roache Lawyers worked with LexisNexis to help validate product requirements, review and improve on early prototypes. They also agreed to evaluate the new Mobility and Outlook integration features, ahead of the official release to ensure that they meet the needs and expectations of the lawyers and teams who will rely on them daily.



## The Result

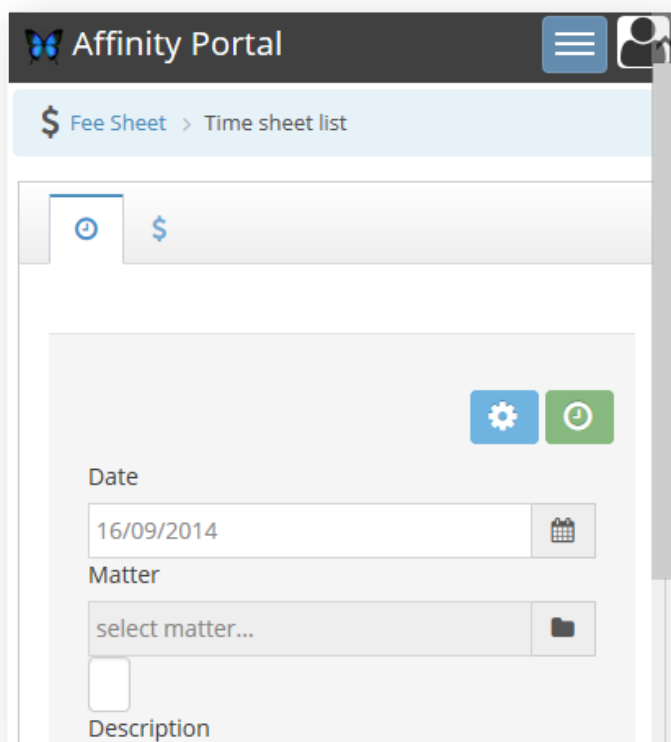
Since the early adopter evaluation began, Lexis Affinity 6.0 has enabled Coulter Roache Lawyers to achieve improved productivity and efficiency gains by streamlining management of correspondence and improving access to information while mobile, in a secure manner. In particular, the new Affinity Portal has improved efficiency and responsiveness to clients, by putting up-to-date information at the lawyer's fingertips.

"The Affinity Portal interface is clean and user-friendly and will help dramatically when our lawyers are off-site for easy access to a client's details to phone or email. The ability to create a Fee Entry anywhere will help ensure items are not missed. For example, easy access to a client's contact details for calling and emailing 'on the go', and the ability to record fee entries are two items our lawyers no longer have to do when they are back in the office," explains Wes Heywood.

Previously, the firm relied heavily on paper files. However, with Affinity's ease in the saving of emails, file notes, letters and documents, this has ensured that the electronic file is accurate, up-to-date and replicates the paper file. With staff increasingly working off-site, having the complete electronic file is essential.

"The advanced Microsoft Outlook integration will improve efficiencies in a number of ways but the ability to drag and drop emails to save in a matter will be extremely advantageous," added Wes Heywood.

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## About Lexis Affinity™

Lexis Affinity™ is a flexible practice management system that streamlines everyday work processes into one system to provide a secure working environment and transparency of business performance. Transform your organisation with an integrated legal software system that provides accounting, matter and client management, document management, precedent automation, workflow, client extranet and customisable reporting.

For more information, visit [www.lexisnexis.com.au/affinity](http://www.lexisnexis.com.au/affinity) or call 1800 772 772.