

3E

Boodle Hatfield

A Comprehensive Roadmap for Law Firm Practice Management

For 300 years, [Boodle Hatfield](#) has been providing insightful and pragmatic legal expertise to wealthy families, property owners, and businesses. Today it has more than 100 lawyers and three UK offices and continues to build on its impressive history through leading-edge legal advice and optimal operational processes. So, when it came to deciding whether to upgrade or replace the legacy practice management system it had in place for two decades, it chose to move to [3E®](#), the market-leading financial and practice management solution from Elite, to meet its current and future needs.

"We needed a financial management system that could keep up with the evolving technological demands of the next 10-15 years. We invested in 3E because we were confident that an Elite solution would meet our needs today and in the future," says David Workman, Finance Systems Manager at Boodle Hatfield.

The firm uses technology to accurately capture all the relevant data it needs to perform its role well for clients, including seamless billing. In selecting 3E, the number one goal was to improve the end-user experience and deliver reliability.

The Merits of 3E

In addition to user-friendliness and stability, it needed to deliver other major improvements compared to the system the firm was using previously. Notably, it was important that the new platform was "configurable, rather than customizable;" that it could integrate with other systems easily; and provide "streamlined" data used for financial reporting. Mobile accessibility was also on the wish-list, so the flexibility provided by 3E connecting into the live system was an attractive feature.

David Workman and his colleagues in Finance were already very familiar with 3E but were keen that the selection process was transparent and involved both "front- and back-end users." So, partners, lawyers, and support staff were brought in to see demos and meet vendors of short-listed products, thereby playing a key role in the decision-making.

Ultimately, "3E won on its own merits," Finance Director Paul Spooner-Lillingston explains. "The mobile application enables lawyers who aren't working in one place to access information on the go. We wanted to be able to configure it rather than

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David Workman
Finance Systems Manager

customize it: we wanted to minimize the need to ask external specialists to re-design things. We wanted to use our own skills to configure the product into what we wanted it to be."

Boodle Hatfield currently uses 3E for its core financial needs, including time recording, billing, and financial reporting, with both front- and back-end users experiencing the benefits. For instance, there was an immediate improvement in time recording, partly because time could now be easily recorded outside of the office. The firm has also benefited from the functionality and flexibility that the billing process delivers. The Finance team notes that querying financial data is straightforward, and key information is readily available through the internal reports and metrics in 3E. Furthermore, the team has comfortably adapted to the functionality for accounts payable/accounts receivable.

Laying the Foundations for Success

After just its first year of using 3E, Boodle Hatfield is already able to point to several other early "wins."

One of the most important "wins" is that no time was lost in the switch-over: the firm was able to continue to bill consistently throughout the process. Other identifiable successes are that 3E is a more stable solution and that the firm's data is now much more streamlined. "We see 3E

providing the firm with the platform from which we can improve our role for our clients," says Paul Spooner-Lillingston. "To undertake a major system change during the Covid-19 pandemic while predominantly working remotely, and then to have emerged the other side with a fully functioning PMS was great and a real 'success story' of our move to 3E. 3E is a solid foundation for the business: we're hoping to create a better and smoother user experience as we develop 3E Data Insights, improve reporting and time recording, as well as fine-tune the billing process."

Paul adds, "For 3E to succeed, we needed the switch to be as painless as possible. At 'go-live', we didn't lose any time and continued to bill consistently. Moreover, there needed to be the potential to develop it over the years ahead through its inherent functionality."

With this future-proof solution now in place, he expects to see lots more benefits as the deployment progresses over the long term.

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BOODLE HATFIELD

With offices in central London and Oxford, Boodle Hatfield's private wealth, real estate, and business expertise covers family and divorce matters, dispute resolution, employment, digital assets, corporate transactions, and commercial property issues.

BUSINESS CHALLENGES

The firm was re-evaluating its legacy practice management system which had been in place for 20 years. It needed a system that was reliable and configurable rather than customizable.

WHY 3E?

3E offered the platform the firm needed through its mobile time-recording capabilities and out-of-the-box billing processing. Its configurability and scope to utilize more of its built-in functionality over time without having to bolt on extras were also attractive.

BENEFITS

- Industry-leading stability
- Flexible to configure and easy to integrate with other software products
- Remote accessibility via mobile app
- Designed to adapt to law firms' long-term needs

To learn more, contact your account representative or visit www.elite.com.