



Reducing the Cost of Legal Accounts Administration

Who:

JDK Legal a boutique law firm located in the Sydney CBD specialising in the hospitality industry and commercial and property law, and services focused on Wills, Powers of Attorney and Probate.

Alleviato is an independent industry focused legal practice management support company providing an array of services including practice & financial management, recruitment, technology and training.

Quote:

“We wanted a cost effective solution to address reduced demand on our accounts function but without adversely impacting the integrity of our record keeping. Alleviato stepped in on short notice and quickly transformed our paper based systems into a more efficient online process.

Steve Dore has a range of skills extending well beyond basic bookkeeping and his ability to unlock additional efficiencies within our integrated accounting and document management system has proven particularly valuable. Our accounting function is now capable of functioning entirely remotely. Whilst this is beneficial for our business generally, it has proven to be particularly helpful since the onset of Covid-19.”

Coming Together:

JDK Legal were introduced to Alleviato in their search for options to restructure and speed up their firm's legal accounting production. The two landed on embedding a trial focused on maintaining both the rhythm of the department and the confidence levels of staff, followed by staggered improvements by enhancing the use of technology and automating manual procedures.

Challenge #1 - Building Staff Rapport and Confidence

Identified early by both parties as one of vital importance, building rapport and confidence within staff was to be a focus. It was agreed that while having the technical capability to remotely run an Accounts department, the wise move was to attend onsite to answer the constant flow of requests and queries from staff that all accounts teams receive during a typical working day. There's a lot to be said about the value of working together in person and the wise move paid off where it was noticeably evident staff quickly moved from wariness to confidence in their Accounts Department and their requests were being actioned on point and on time as they'd always known and expected.

Challenge #2 - Implementing Change

From the outset JDK Legal were ideally positioned to see gains from automation with the use of leading technologies with good support, and equally due to the fact their Accounts had always been immaculately maintained.

This ensured the focus could remain on finding efficiencies, not fixing ingrained or back processing problems, or limitations imposed by disparate or outdated technology. The challenge however lay in the human element and the common theme facing many firms which is the array of staff and their wide range of interest and capability to use technology and adopt new processes.

It was decided that change would come with a long term view, delivered in focused areas of most value and in “bite sized” chunks so as to not disrupt users but support them with an overarching end goal and message from management. Being conscious that even the smallest ripple of process change can feel like a tsunami to some, taking the long term approach is the wise way forward.

Automation Example #1 - eFiling for Trust and Office Receipts

Alleviato designed and implemented a digital e-filing system for JDK Legal’s trust and office receipts where at the click of a few buttons batches of receipts are automatically filed in PDF to the firm's document management system and emailed around to relevant staff, removing all need for physical filing. This saves on printing and manual labour costs, as well as the professional appeal of the design of receipts and the time it takes to provide staff with important information pertaining to their matters.

Beating Covid-19 to the Punch

Having the willingness to trial remote delivery of any or all Accounts related processes in early 2020, JDK Legal were well prepared for the troubled times of Covid-19 and in particular the imposed need to work entirely remotely. During this time JDK Legal's Accounts department saw zero disruption, delivering the same level of service to staff and the flow on effect for the service to JDK Legal's clients.

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