

## File Management Accelerator

A faster way to optimise business efficiency



## Lexis® Visualfiles Accelerators

### Legal practice today: a challenging marketplace

**In today's legal market margins are slim, regulations are stringent and clients are demanding. What's more, you're striving to win business against both established competitors and a host of new entrants. And whether you work in a law firm or an in-house legal team, you'll be well aware that high levels of productivity are expected, despite constant downward pressure on budgets.**

Maximising business success in the face of all these challenges is likely to be a struggle if your firm relies on manual or ad-hoc approaches to contact management, document production, progress tracking and other critical work. How far could you improve productivity and customer and client service, if you transitioned to more efficient and structured ways of working?

Implementing Lexis Visualfiles can help you do that. It's the leading software for increasing the efficiency of operations such as conveyancing, debt recovery and personal injury; and is widely used in shared-service local authorities. In almost any part of your organisation, Visualfiles can raise efficiency and effectiveness by streamlining processes and enabling teams to work faster and smarter.

### 300 organisations, 25,000 users

More than 300 organisations around the world – including law firms, financial services providers, insurance companies, and local and central government departments – rely on Visualfiles technology, and it supports a population of more than 25,000 users.





## Get off to a flying start

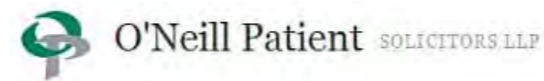
Quickly apply Visualfiles to any area of your business and see the benefits immediately.

To maximise the efficiency and effectiveness of any business activity, you'll want to introduce a solution that truly complements the way you operate — but doing that can take time. Time you may not have if you need to quickly improve existing working methods, and you're under pressure to show rapid results.

That's why we've developed the Visualfiles Accelerator for file management. The Accelerator will allow you to swiftly take advantage of the efficiency gains Visualfiles can bring to any business process through a structured framework and workflows. More than that, it will provide you with a solid foundation to help speed future developments as your business grows and changes.

*"The biggest benefit of Visualfiles is that it facilitates incremental business efficiency. The developmental capability and automation within Visualfiles allow us to develop new business and quality control processes in-house."*

**Sue Brown, Managing Partner,  
O'Neill Patient Solicitors LLP**



## Accelerate business efficiency improvements

The File Management Accelerator is designed for rapid implementation to help you quickly make any business process more efficient.

Once you've seen how the Accelerator enhances process efficiency straight out of the box, you'll be inspired to build on it to add structure and workflow to any area of your business — including legal operations, project management, human resources, complaints handling, customer relationship management, and many others.

Customisation training can be included in the package to help you adapt the Accelerator in line with your specific needs.

**With out-of-the-box access to Visualfiles file management capabilities, you'll be able to:**

- Help teams work faster and more efficiently.
- Improve information, contact and document management.
- Reduce costs by automating data flows and document production.
- Make it easier for team members to find and share information about files and projects.
- Enhance your ability to track the progress of files and projects, and receive alerts when key dates or stages are missed, so that you can take action.
- Delegate routine tasks to junior staff, such as managing enquiries, confident they'll have easy access to all the information they need.
- Simplify administrative work, freeing up senior people to spend more time developing external relationships and bringing in new business.
- Handle a growing workload efficiently, without impacting on the quality of the service you deliver.

### How does licensing work?

If you're already a Visualfiles user with sufficient licences, you just need to invest in the Framework together with the File Management Accelerator.

If you're new to Visualfiles, you'll need to invest in the Visualfiles platform, user licenses and Framework along with the File Management Accelerator.

- Seamlessly work from within Microsoft Outlook, with access to files and projects.
- Benefit from History Plus, our additional document management module, with its rich document searching, sharing and management capabilities.
- Exploit Visualfiles capabilities to enable integration with third-party systems and online providers, such as your clients' systems or government portals.
- Easily extend to provide online and mobile access for your clients.

## File Management Accelerator: features and capabilities

The Visualfiles File Management Accelerator provides rapid access to features that will help to streamline many different areas of your business. You'll have a pre-built set of related capabilities to manage files and projects, including the individuals, information and documents involved; key project stages and dates; and audit and activity trails.

Feature		Use it to...
<b>Summary screen</b>	Consolidate key information about a file or project	<ul style="list-style-type: none"> <li>Define the work areas (eg banking &amp; finance, commercial, construction etc) for the file or project</li> <li>Set the key internal personnel involved</li> <li>Display key external parties with their contact information</li> <li>Drill down to see more information about a party</li> <li>See the current key stage</li> <li>See a record of the progress of the file or project through key stages to date</li> <li>Amend the current key stage</li> <li>Set mandatory key actions and key reporting dates for a selected key stage</li> </ul>
<b>Parties screen</b>	Simplify management of the parties involved in a file or project	<ul style="list-style-type: none"> <li>List parties with their roles and contact details</li> <li>Add, remove and amend parties and their associated information</li> <li>Use shortcuts to quickly create correspondence such as letters, emails and reminders</li> <li>Drill down for more information about each party</li> </ul>
<b>Alerts</b>	Record alerts against a file or project	<ul style="list-style-type: none"> <li>Define standard alerts (eg reminders, notes about a client etc) that can be created at file/project creation, and add further alerts as required</li> <li>Set alerts for a specific audience</li> <li>Apply normal, high or critical status to an alert</li> </ul>
<b>Key actions</b>	Define key actions for types of work	<ul style="list-style-type: none"> <li>Apply key actions to file/project creation, key stages or party types</li> <li>Connect key actions to specific workflow processes</li> <li>Enable key actions to display on the file's home page</li> </ul>
<b>Key reporting dates</b>	Define key reporting dates for types of work	<ul style="list-style-type: none"> <li>Apply key reporting dates to file/project creation, key stages or party types</li> <li>Enable key reporting dates to display on the file cover</li> </ul>
<b>Key stages</b>	Define key stages for types of work	<ul style="list-style-type: none"> <li>Set initial key stages for files/projects</li> <li>Create an audit trail of the progress of a file or project through the key stages</li> <li>Use workflow to automate the progress of a file or project through key stages</li> </ul>
<b>Key information</b>	Define key information types and items	<ul style="list-style-type: none"> <li>Group information items under key information types (eg risk information) and party types (eg client)</li> <li>Associate key information items with key stages</li> <li>Produce key information schedules</li> </ul>
<b>Attendance</b>	Record an attendance with any party	<ul style="list-style-type: none"> <li>Use in-built time recording if required</li> <li>Record history items</li> <li>Produce attendance notes/reports for audit trail purposes</li> </ul>
<b>Caller verification</b>	Associate security checks with parties for verification purposes	<ul style="list-style-type: none"> <li>Implement security checks based on security words and question/answer pairs for defined parties</li> <li>Record the performance of a security check, eg when recording an attendance with a party</li> </ul>

## A solution that evolves with you

### The File Management Accelerator is your foundation for the future.

Visualfiles is a flexible, functionally rich toolkit that's proven to work at scale, and can help increase the efficiency of almost any business area.

Once you're up and running with the File Management Accelerator, you'll have a foundation on which to easily build bespoke solutions and workflows to increase the efficiency of almost any business activity or process. So no matter how fast your business grows or what direction it takes, you won't need to look for another solution. You can start quickly, using the powerful framework that underpins the File Management Accelerator, and be confident that this can evolve into a fully functioning case management solution should you require.

At any time, you can call on our client advising and professional services teams to help you tailor your Visualfiles implementation to meet more complex or extensive requirements. They'll work with you to develop your solution in line with changing market conditions and business imperatives, and help keep your organisation on track for continued success.



## Contact Us >

### Lexis<sup>®</sup> Visualfiles<sup>™</sup> Accelerators

#### For more information

To find out more about [Lexis Visualfiles](#) and to discuss your firm's specific business requirements, please visit [www.lexisnexis-es.co.uk](http://www.lexisnexis-es.co.uk), email [salesinfo@lexisnexis.co.uk](mailto:salesinfo@lexisnexis.co.uk) or call [+44 \(0\) 113 226 2065](tel:+44201132262065) to speak to a LexisNexis Enterprise Solutions consultant.



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