



Xperate

CONSULT - DEVELOP - DELIVER

## Bringing Your Ideas To Life

### Case Study

Keystone Law

Developing an Integration between P4W and NetDocuments

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Keystone Law's ongoing relationship with Xperate made us the obvious development partner when Keystone wanted a small but valuable refinement to how its invoices are filed as invoices generated in P4W were not automatically saved in the related matter workspace in NetDocuments. Xperate were tasked with the creation of this missing integration.

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# KEYSTONE LAW

"This has been a very nice, short, sharp, project that has delivered value from the day it launched - a fantastic result which went absolutely to plan and we would have no hesitation in recommending Xperate based on this experience."

Maurice Tunney,

Director of Technology & Innovation, Keystone Law

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## BACKGROUND

Keystone Law is an award-winning, full-service AIM listed law firm with a different approach that enables lawyers to work 100 per cent remotely and that has resulted in Keystone becoming, without acquisitions or mergers, one of the fastest growing law firms in the world.

The Keystone model provides lawyers with the freedom and flexibility to focus exclusively on providing high calibre legal advice to clients without the usual management burdens, and working from any location. Every lawyer is also remunerated handsomely with 75 per cent of everything that they bill. With the 25 per cent the firm retains, it provides all of the services lawyers require, ranging across marketing, finance, IT, compliance, networking and collaboration, and more.

These support services are delivered by a team of centrally employed professionals using a carefully crafted technology stack comprising a combination of bespoke software and a range of best in class "off the shelf" products including NetDocuments for document management and Partner4Windows (P4W) as the behind-the-scenes finance system.

The appeal to experienced lawyers of this model is such that Keystone has grown from its foundation in 2002 to a complement of more than 400 lawyers in 2022. Meanwhile clients benefit from working with highly experienced lawyers, often working in teams with colleagues from across the firm to deliver advice in almost every area of law. As a result, Keystone Law was awarded the prestigious title of Law Firm of the Year at The Lawyers' Awards in 2020.

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## CONSULT

Maurice Tunney, Keystone Law's Director of Technology and Innovation describes the firm's technology approach as "swan-like". Their lawyers enjoy a simple, serene and frictionless experience when working on their systems while under the surface the technology is doing the heavy lifting and Keystone is constantly striving to improve every element of its systems and processes to ensure that it continues to deliver a "best in class" service to its lawyers.

As part of this ongoing process, the developers at Xperate have worked with Keystone over a number of years and their knowledge and understanding of the business model and its technology stack (particularly P4W and NetDocuments) was central to Keystone's decision to partner with them in this project.

Keystone considers system automation to be a fundamental tool in driving efficiency and as such it was a logical step to seek to deliver a suitable integration between the finance system (P4W) and the document management system (NetDocuments) so that invoices to clients could be easily accessed by the lawyers in NetDocuments. This would improve the lawyer experience while simultaneously reducing the administrative burden on the finance team. They asked Xperate if it could integrate the two systems and Xperate said "Yes."



### Key Integration Requirements

- Automate process of saving invoices generated by P4W into the correct matter file in NetDocuments
- Work within the existing system security controls
- Ability to retrospectively file historical invoices in NetDocuments
- Seamless integration between P4W and NetDocuments
- Admin UI for ease of administration
- Ability to extend integration to other types of documents stored in Case Manager
- Ability to upload to multiple NetDocuments Cabinets



## DEVELOP

Why did Keystone turn to Xperate? As Ashley Miller, Director of Finance at Keystone Law explains, “We have extensive experience of the developers at Xperate who have worked alongside us on our customisations of P4W for many years and as a result know our systems very well. They also have a thorough technical and cultural understanding of Keystone, which has enabled them to work with us in a very efficient manner.” The Xperate team were therefore very quickly able to quickly research the task, put together a Technical Statement of Work, costings and a timeline with work starting in late April and delivery to Keystone in early June.

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Ashley Miller, Director of Finance, Keystone Law

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Automatically saving invoices in P4W and synching them into the correct folder within NetDocuments may appear to be a small administrative step, but it had a number of challenges from a technical perspective. Keystone has many controls in place within NetDocuments to ensure client data is secure whereby only the lawyers working on a matter have access.

Xperate had to work within that security model. But importantly, because of the pre-existing relationships and expertise that Xperate could bring, they were able to do the development work while incurring the minimum of disruption to Keystone’s systems. Once the code was written by Xperate’s offshore developers, some tests were run on Keystone’s system and as it performed as expected first time, the solution went live on budget and on schedule.

Every new P4W-generated invoice is now automatically being filed in NetDocuments. Meanwhile Keystone can decide how far back it wants to date the retrospective filing of historic invoices into NetDocuments. “After two weeks the lawyers loved it and wanted to see all their past invoices moved!” says Tunney.

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“We have always had positive dealings and interactions with the team and this project continued that fantastic trend.”

Ashley Miller, Director of Finance, Keystone Law

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## DELIVER

When asked how Keystone found the experience of working with Xperate on this project, Miller was very quick to respond: “We have always had positive dealings and interactions with the team and this project continued that fantastic trend.”

The internal communication of this new development was exceptionally simple and very well received. It was simply a matter of sending an email to all the firm’s lawyers saying: “Great news – in another new IT development all of your invoices will now automatically be saved in the matter space on NetDocuments and you no longer need to manually save them.”

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Maurice Tunney,  
Director of Technology & Innovation, Keystone Law

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This new solution adds another level of refinement in Keystone’s mission to constantly engineer ways to make life easier for lawyers and achieve significant time savings. Going forward the value to the business, in particular the finance team, is that the huge amounts of time spent dealing with requests for invoices is now a thing of the past.

Tunney’s conclusion is that “This has been a very nice, short, sharp, project that has delivered value from the day it launched, a fantastic result which went absolutely to plan and we would have no hesitation in recommending Xperate based on this experience.”

# ABOUT XPERATE

## What we do

Put simply - we develop software for you.

It is difficult to find good developers, expensive to recruit them and then hard to manage and retain them; especially if software development isn't your primary business.

You may have thought about outsourcing before but it is difficult to know where to start. Many of the well-known outsourcing companies are not set up for smaller projects or teams and everyone has a story about what can go wrong.

That is where Xperate can help.

## How we work

We are a UK based software development company with offices in the UK and India and we offer everything from a full design and development service through to short term projects.

We specialise in working with SME businesses requiring anything from one or two developers for a couple of months up to firms wanting to outsource their development over the long term.

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