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Case Study

Peters and Peters

Integrating Chrome River with Partner for Windows

How an Xperate integration has made it possible for Chrome River to work with P4W

Imagine your firm's desire to acquire a state-of-the-art, best-of-breed expense reporting and invoice processing system is frustrated by the fact it won't integrate with your long-established practice and case management system? Happily, this was not the case when Peters & Peters sought to adopt Chrome River Invoice, because Xperate was able to create an integration between it and P4W that ensures all the anticipated benefits of Chrome River are fully realised.

PETERS & PETERS

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Brian McDonald, Head of IT, Peters and Peters Solicitors LLP

BACKGROUND

Founded in 1938, Peters & Peters Solicitors LLP is a multi-award-winning City of London-based global firm that focuses on commercial litigation, financial and business crime, and fraud at the highest levels. Specialising in heavyweight international disputes, it's Business Crime and Investigations team is acknowledged by Chambers UK as "outstanding", while its Fraud and Commercial Disputes team is described in the Legal 500 Directory as "London's best". The firm fields an international team of 70 experts, speaking 20 major languages and working with a network of specialist lawyers and investigators all over the world. It has handled some of the biggest cases ever to go through the courts, and its client list includes governments, corporations and institutions, as well as high net worth and high-profile individuals.

CONSULT

The firm wanted to increase the efficiency of supplier invoice handling by automating processes and removing as much manual keying as possible; as well as eliminating other time-consuming tasks such as approvals chasing and responding to vendor payment queries. Peters & Peters' Head of IT is Brian McDonald. Working with Accounts Receivables, Brian identified that Chrome River was superior to anything else available. Accordingly, the firm decided to introduce Chrome River Invoice.

However, it then emerged that there was an issue: Chrome River Invoice wasn't able to talk to the firm's long-established practice and case management system, Partner for Windows (P4W). This created a significant problem that threatened to negate all the efficiency gains that the new system was supposed to deliver. It seemed that manually re-keying would be the only way to ingest invoice information from Chrome River Invoice into the firm's back-end accounts and management information systems. Aside from the time penalty, this also potentially raised accuracy, security and cost concerns. The firm recognised that it needed a slick integration between the two systems that would be automatic, secure, reliable, quick and seamless, and that moreover would ensure a single version of the truth between systems. Because without it, Chrome River Invoice wouldn't be viable. "It would just be horrendous to be honest," says Brian.

Recognising that it needed expert third-party support to develop such an integration, Peters & Peters' first choice of partner was Xperate. When Brian McDonald learned of Xperate's existence and the personnel involved, he knew from prior experience that they would bring deep technical knowledge of P4W. Moreover, Xperate's USP is offering bespoke, pioneering solutions to the systems problems that law firms face. Once he started talking to Xperate it quickly became clear that he'd made a good decision. Xperate understood the issues, and Brian immediately had a lot of confidence that they would build and implement an effective solution – and so it proved.

Key Requirements

- Create integration between Chrome River Invoice and Partner for Windows that was
    - Automatic
    - Quick
    - Reliable
    - Secure
    - Accurate

- Eliminate manual re-keying into back-end accounts and management information systems

- Improve speed and efficiency of invoice handling

- Ability to process invoices from Partner for Windows back into Chrome River without manual intervention

- Project to be completed on time and on budget

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DEVELOP

The project began with an initial project meeting and some scoping calls that generated a Statement of Work. This included accurate pricing once Xperate was clear about the parameters of the project.

When work got underway in earnest, Xperate quickly developed a solution that was handed over to Peters & Peters for thorough testing. Brian says of the project: "It was pretty much plain sailing. We even moved the goalposts along the way, but Xperate was more than happy to adapt with us. From start to finish we were in constant contact and never left to feel alone or stranded."

In fact, Peters & Peters came up with a new project requirement. The original aim was that information should flow seamlessly from Chrome River Invoice into the correct fields, files and folders in P4W. But the firm subsequently realised it would also be hugely useful if information could flow in the other direction as well. Specifically, Peters & Peters wanted it so that when a new supplier, client or matter was opened in P4W, that information would go back through to Chrome River. Thereafter when an associated invoice arrived – for example from a translator who's worked on a specific matter – Chrome River Invoice would recognize, accept and process it appropriately with no need for manual intervention. In fact, Xperate took this change in its stride and resolved it within one day. Brian feels this typifies Xperate's approach. "They were very efficient and knowledgeable throughout," he says, "ensuring the implementation was extremely thorough, on time and on budget."

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DELIVER

The integration project has been an unqualified success because it has enabled Peters & Peters to maximise its return on the investment made in Chrome River Invoice. New business processes have been introduced and the firm has already seen a large uptake of the new software, ensuring that multiple users' time is being saved.

The new systems are assisting with accounts reporting and the speed and efficiency of invoice handling has increased. The intrinsic benefits of Chrome River Invoice are being realised, which include greater accuracy and productivity, better late payment analysis and spend optimisation, expanded visibility and better fraud prevention, and the elimination of duplicated effort. "The main thing we notice," says Brian, "is the quickness and the workflow processes that are changing the way things are done in terms of receiving invoices and getting them straight into the system and checked through to the approval process. It also enables all the auditing and tracking we need to follow invoices all the way through the system."

This also has a beneficial, if indirect, impact on client service levels. Partners and other fee-earners in receipt of invoices from, say, special counsel or a reprographics company, can readily submit invoices into Chrome River Invoice. And, unless the invoice is picked up and subjected to a line-by-line scrutiny at the approvals stage, it will be quickly processed in Chrome River and recorded in the P4W client ledger and reports, freeing up fee-earners' time and keeping important suppliers happy.

In summary, Xperate's integration piece is successfully enabling a new system that is smooth, efficient, accurate and quick. As a result, Brian would happily recommend Xperate to other firms looking for a similar bespoke solution. "I would say they're very competent," he notes. "You get the situation sometimes with suppliers that they don't really know the answer so they send it back to you and say: 'It's not our issue'. With Xperate, there hasn't been a question so far that I've asked that they've not been able to answer. Their knowledge and understanding of us and the legal sector made them very easy to work with. We've formed a great relationship and look forward to working with them again in the future."

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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.

Visit www.xperate.com to learn more.