



# Xperate

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## Case Study

### Sternberg Reed

Using RPA (Robotic Process Automation) to migrate data from an  
acquired Case and Practice Management System

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# BUILDING A PIONEERING SOLUTION TO MIGRATE DATA FROM AN ACQUIRED CASE AND PRACTICE MANAGEMENT SYSTEM

When Sternberg Reed made its latest acquisition, the firm was taken aback by how difficult it would be to transfer data out of the acquired firm's practice and case management system into Sternberg Reed's own system. Fortunately, Xperate was able to build an innovative solution using bespoke robotic process automation.

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## Sternberg Reed LLP Solicitors

“[Xperate] think outside the box and they find ways of working using the most current technology that you may not have come across. They really do come up with solutions that you don't know about and they are worth every penny.”

*Kelly Rotheram, Chief Executive, Sternberg Reed LLP*

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## BACKGROUND

With offices in Barking, Romford and Grays, Sternberg Reed is a big, traditional, high street law firm offering the whole breadth of legal services to private and business clients across East London and Essex. The firm has over 60 legal specialists, is Law Society Lexcel accredited, and has been recognised by The Legal 500 and Chambers as a leader in its field. Since its foundation in 1976 the firm has grown steadily by providing high quality legal work and by having specialists who can take on complex and demanding cases. At the same time, the firm is committed to providing quality, affordable legal services in the communities it serves. As a result, an unusually high proportion – 50 per cent – of its work is legal aid. To make this economically viable, Sternberg Reed relies on extremely efficient systems and streamlined ways of working.

In mid-2022, Sternberg Reed acquired another law firm. However, as the acquisition got underway, Kelly Rotheram, Sternberg Reed's Chief Executive, uncovered a problem.

The acquisition hosted all its client data on a cloud-based practice and case management system (PCMS), but it became apparent this particular PCMS could offer no simple way of enabling this data to be extracted. Despite Sternberg Reed's every effort to find a solution, and with the clock ticking and only a month left before the acquisition went through, the best the PCMS could offer was a function that allowed the download of documents, 100 at a time, by copying and pasting.

Kelly Rotheram calculated that – beside it being excruciating work – the extraction of all the firm's data by this manual method would take a crew of paralegals and accounts people more than a year to complete. Yet clearly Sternberg Reed needed access to this data much sooner. Indeed, the firm wanted to be able to service its new clients from day one, not to mention enabling its new staff members to carry on working and to maintain a revenue stream.

In addition, given that Sternberg Reed handles family and crime work, as did the acquisition, there was scope for conflicts to arise. For example, Sternberg Reed might find it had inherited a criminal case on behalf of a husband whose wife's divorce it had already been instructed on. It was critical to be able to conduct conflict checking as part of the acquisition.

Furthermore, Sternberg Reed needed access to comply with the data retention requirements of GDPR legislation. It additionally would assume professional responsibility for closed matters and archived data on acquisition. The firm could be inheriting cases that could give rise to future malpractice or negligence claims, so would need access to this data.

Kelly worked out that she required an immediate plan for opening up case files in Sternberg Reed's own practice and case management system. As for access to documents, this could be done by maintaining access to the existing system throughout the transition. The drawback, though, was that there were only eight licences to work with, which would have to be shared between fee-earners, accounts and Sternberg Reed's centralised phone answering team who needed access to deal with queries. Clearly a much better solution was urgently needed, prompting Kelly to get in touch with Xperate.

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Kelly Rotheram, Chief Executive, Sternberg Reed LLP

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## CONSULT

Sternberg Reed has used its practice and case management system, Partner for Windows (P4W) since 2019. At the time of the implementation Kelly had a unique request of the vendor. Given the very high proportion of Sternberg Reed's work that is legal aid, she wanted all of the firm's legal aid data to be transferred into P4W complete with its legal aid tables, rather than leave these to be set up on a matter-by-matter basis.

This challenge was met, specifically by the vendor's former CTO, Mark Garnish and his team. "It worked brilliantly," recalls Kelly. She subsequently became a convert to P4W and went on to take up the role of Chair of the P4W User Group. Meanwhile, Mark Garnish and his colleague Simon Hill made a migration of their own, setting up Xperate in 2021.

Against this backdrop, when Kelly needed a quick, reliable solution to her urgent problems, Xperate was the obvious vendor to call. "This was a project of extreme urgency," she says, "and I knew from experience of the individuals at Xperate that they would be able to turn things around very quickly. I had a great amount of trust in the quality of the team there and I knew you couldn't ask for better knowledge of the P4W database and how to put data into it."

Xperate was contacted less than a month before the acquisition date, so had to hit the ground running. Kelly wanted all the acquired matters to be accessible within P4W, with correctly allocated fee-earners, within a day of acquisition. She also needed to be able to reconcile all the account balances against the client money being transferred.

For Xperate, this was relatively straightforward. Kelly had found that it was possible to run a report in the legacy PCMS that populated an Excel spreadsheet with all the necessary client, matter and balance data. Conflict checking could then be undertaken in the period between exchange and completion, and Xperate could get on with developing and testing a migration script.



### Key Requirements

- Develop a method to extract all client data from a cloud-based PCMS and import it quickly and accurately in their own PCMS
- Design and build a solution to eradicate manual process of downloading documents from acquired system reducing the need for manual intervention
- Imported data is fully conflict checked to firm's specification
- Ability to use acquired client data from date of acquisition
- Ensure data complied with GDPR Legislation
- All client balances to be reconciled against client money being transferred
- Migration of over 50,000 documents into the correct file structure within Partner for Windows



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## DEVELOP

On acquisition day itself Sternberg Reed was able to run a final report to extract the latest data. That spreadsheet was passed on to Xperate to run its well-tested migration script. This successfully imported all the spreadsheet data into P4W. The script included logic on which fee earner each matter should be allocated to and some logic on cases to exclude that Sternberg Reed didn't want because of conflicts. All the new client balances on the Sternberg Reed journal matched to the penny the money received on the date of the funds transfer. Twenty-four hours after the acquisition, everything was where it needed to be, apart from all of the matter documents still sitting in the legacy PMS – which was a lesser priority. This migration was Phase 2 of the project.

In fact, the acquisition firm was unusual in so far as it had absolutely no paper records or archives. Everything had been digitised, making it more of an imperative to migrate the material promptly.

To expedite the migration, Xperate put a sophisticated solution together. This involved the creation of RPAs – Robotic Process Automations. These bots automatically reproduced the sequence of keystrokes required to extract documents from the cloud based PCMS and put them into a holding area in Sternberg Reed's private cloud.

However, making the RPAs work smoothly was not straightforward. Writing something that worked very well was relatively simple. But something that worked perfectly was much harder, because in the testing phase the bots were tripped up by a range of anomalies. The biggest challenge was understanding the universe of these and coding to get around them. This included refining the process to slow the bots down to keep pace with the browsers they were working on. Nor could any of this work begin in earnest until after the acquisition, at which point Sternberg Reed had use of the PCMS licences.

Notwithstanding the difficulties, Xperate's development team in India took this on, ironed out the issues and developed a successful process. Thereafter, within the constraints of the four available licences (Sternberg Reed was using the others for day-to-day operations) and available browser speeds, all live matter documents were successfully migrated within eight weeks of the acquisition – this being around 50,000 documents. Thereafter, it took around seven hours to successfully move all the documents in the holding area into the correct files in P4W.

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“I knew from experience of the individuals at Xperate that they would be able to turn things around very quickly. I had a great amount of trust in the quality of the team and I knew they would be able to solve this puzzle and find a solution for us.”

Kelly Rotheram, Chief Executive, Sternberg Reed LLP

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## DELIVER

Throughout the project, Kelly found the experience of working with Xperate to be: "... really, really good. They document everything really well. They tell you what you need to know. When you need to make a decision, they put it in a clear and concise way. And the team are great because they always seem to be available. Being able to move things forward outside of the nine to five really made a big difference."

Kelly also notes that Xperate operates with a lot of common sense. "Often they will use their initiative and say: 'This is what we think you should do as a solution'. They have sensible ideas and they understand how law firms work, which is great." As to the business impact of the project, it's incalculable. There's been a huge cost and time saving, as well as the value of being able to function on day one of the acquisition, which, says Kelly, "cannot be overestimated." She explains: "It was being able to have the fee earners come in and be able to work. If you have a busy conveyancing department and they've got exchanges and completions it can't wait. Nor can court dates. It meant I could train the new team on our system on their own matters and get them working very, very quickly."

Kelly would therefore warmly recommend Xperate. She says, "I have nothing but praise for them. These are very complicated issues to overcome. In my experience not all consultants add value, but Xperate certainly do."

She continues: "They think outside the box and they find ways of working using the most current technology that you may not have come across. They really do come up with solutions that you don't know about and they are worth every penny. Also, they are keen to add value in relation to the cost and so you feel like you've explored all the available options and made the right decisions based on all the information presented. So yes, I absolutely would use Xperate again."

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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.

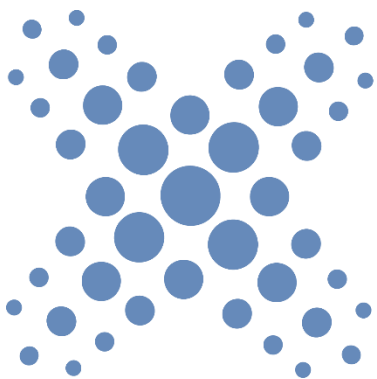
That is where Xperate can help.

### 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.

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