



Case study

BLAKE MORGAN

Making a difference, at pace.

"Moving everyone onto a single practice management system is the foundation that drives consolidation and enables our legal teams to work in a consistent manner across the firm."

- Mike Wilson, Managing Partner of Blake Morgan

Making a difference,
at pace



Being the firm of choice for its clients and people, Blake Morgan chose Peppermint's technology as an enabler for business success.

Formed in 2014, following the merger of Blake Lapthorn and Morgan Cole, with over 800 employees, this national full-service law firm needed to simplify processes, unite people and connect their data in order to maintain their strategic growth plan.

The firm went in search of an agile technology solution that had the capability to help them consolidate a variety of disparate systems into one single source of data and view of the client. This is when Blake Morgan discovered Peppermint Technology.

Driving change with Peppermint

Blake Morgan recognised the need to streamline its operations in order to consolidate working practices and continue to expand and develop the business. Opportunities to decommission legacy IT systems, rationalise business processes and adopt a new way of working on modern technology architecture were key. Therefore, any investment in technology needed to meet with strategic growth plans; to expand the business further, meet regulatory compliance, reduce cost and grow revenues.

Following a review of the legal tech market, it became clear that Peppermint's unique legal software met those needs. The core solution, Peppermint CX, provides progressive legal organisations with a single platform, providing a single view of all data across practice management, case and matter management, document management and business development/CRM.

Matthew Clarke, Finance Director for Blake Morgan reflects, "We were drawn to Peppermint from both an innovation and technology platform perspective. We recognised it would improve engagement with our clients and ultimately drive value and growth, more than a traditional PMS system would."

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Being built on Microsoft Dynamics 365, Peppermint's platform provides a familiar, intuitive user interface that integrates seamlessly into every day working practices and enables new users to quickly adapt to the technology.

Gary Young, CEO of Peppermint Technology, comments, "Peppermint's strategic alignment with Microsoft and its unique single platform architecture is ideally placed for legal businesses such as Blake Morgan. Legal firms and organisations who are going through a period of M&A activity, as an example, need a solution that can simply consolidate and align their technology."

Not only is the technology able to centralise data, systems and processes, it also provides the opportunity for improved collaboration and communication between different office locations and improves the working environment for people at the firm.

Staged implementation

"In the first month we ran £7 million of billing through the software with no issues."

Blake Morgan's primary objective was to consolidate practice management at the firm. Therefore, a stepwise approach has been taken to implementation, starting with the replacement of their main practice management solution which went live in May 2017, following the end of their financial year.

"We deliberately chose May for the initial go-live to minimise disruption during the switch. This allowed us to run year-end on our old system and then begin inputting the next financial year's data on the new system. It was also a more convenient time to complete the necessary training, allowing everyone to get to grips with the system at an operational and client-facing level, for example for billing and time recording. In the first month we ran £7 million of billing through the software with no issues. By the time we got to the end of the first quarter, we were fully on track with where we planned to be" said Matthew Clarke.

In May 2018, on the one-year anniversary of its go-live date, Blake Morgan confidently upgraded its software to the new Peppermint CX platform. This second phase of the program enabled them to extend the use of the platform and begin the consolidation of systems following previous mergers.

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The final stage of the project, which involved 2 significant migrations, was successfully completed within 9 months, with the final migration completed in May 2019, exactly 2 years since the initial implementation.

Mike Wilson, Managing Partner of Blake Morgan, commented, "It is particularly noteworthy that, aside from project management, we completed the migration without external support. The support we have received from Peppermint has been second to none, both pre and post go-live."

Gary Young commented, "Go-live successes were supported by great planning and team-work from both organisations. In particular, the processes put around the early 'life support', that provided essential support at the firm; to take the platform live and choosing to phase deployment were fundamental."

**£7m
OF BILLING
IN THE FIRST
MONTH**



**PLATFORM
CONSOLIDATION**

Business results

"This is the first time in our history we have been on a single system within Blake Morgan."

The move to the Peppermint platform has enabled Blake Morgan to unite people and consolidate working practices across the firm.

"This is the first time we have been on a single system within Blake Morgan," said Mike Wilson, "Moving everyone onto a single practice management system is the foundation that drives consolidation and enables our legal teams to work in a consistent manner across the firm."

By consolidating onto a single platform, Blake Morgan have been able to create a single view of the client and removed the need to review multiple records in multiple systems. The platform provides powerful client dashboards that will enable the firm to truly understand the breadth and depth of client engagements, optimise service delivery for existing clients and inform pitches for new clients.

The move onto Peppermint has also provided the opportunity to review working practices and create efficiencies. For example, Blake Morgan have taken the decision to remove online transaction requisitions. This means that as soon as a person with the right authority levels approves an action, there is no finance gate, they just press a button and it happens automatically.

Matthew Clarke said, "When we took a closer look at finance workflows, we were able to drive significant efficiencies through automation of steps that were previously manual." He continued, "We've really started to challenge ourselves around the touch-points and focus efforts on actions that are truly value-add."



SINGLE VIEW OF CLIENT



CONSISTENT WORKING PRACTICES



AUTOMATED BUSINESS PROCESSES

Next steps

"We see that Peppermint can offer real value in helping us get the most out of the relationships we have with clients."

Following consolidation of their practice management systems onto the Peppermint platform, Blake Morgan can now switch their focus to continuous improvement and opportunities to enhance client experience.

Matthew Clarke said "I saw a real strength in Peppermint around the interaction of the different modules - the integration with client and CRM functionality - and the concept of only doing something once. We deal with intelligent people that don't like repeating tasks unnecessarily so separate systems can be a challenge and often result in differences between data."

Mike Wilson concludes "We are continuing to work in partnership with Peppermint and are now moving into the next phase of the project. This will focus on implementation of the different capabilities within Peppermint CX beyond those of standard PMS systems in order to enhance our client facing capabilities. We see that Peppermint can offer real value in helping us get the most out of the relationships we have with clients."



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It is this tailored and personalised approach, coupled with our real-world and varied experience that really set us apart. Our clients tell us we quickly become fully immersed in their business and act as an extension to their team. Our straight-talking and pragmatic approach to their legal matters are highly valued.

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