VALENTA

CASE STUDY
Elevating Legal Excellence:
Valenta's Strategic Integration at Parris Whittaker

ENSURING SCALABILITY IN OPERATIONS WITH ADVANCED SOPS

INDUSTRY:
Legal Service

LOCATION:
Nassau, Bahamas

CHALLENGE:
Enhance operational efficiency by defining Standard Operating Procedures (SOPs) and integrate advanced legal systems like InTouch CRM and CLIO

SERVICES:
Process Optimization, Technology Integration, Workflow Definition, Role Standardization, Knowledge Repository Development

Applications Used

INTOUCH   **Clio**

Valenta Drives efficiency at Parris Whittaker by building a robust operational framework through SOP Definition that ensures legal systems integration.

Success Highlights
Streamlined processes to ensure effective integration with CRM, developed model business processes for building partnerships, increasing operational efficiency and created a knowledge repository for future reference.

Project Duration: 4 Months

Background
Parris Whittaker, based in Nassau, Bahamas, stands out as a premier law firm with a focus on both local and international businesses. The firm offers a broad array of services, with qualified litigators and advocates with a global perspective. With over 70 years of experience, and a global presence, Parris Whittaker, with their team of attorneys, each with unique industry knowledge, serves clients in navigating Bahamian laws and regulations with relative ease, catering to local, regional, and international businesses and individual requirements.

Challenge
Parris Whittaker grappled with operational deficiencies, marked by the absence of Standard Operating Procedures (SOPs), the need for a centralized knowledge repository, and the essential task of ensuring the seamless integration of advanced systems like InTouch CRM and CLIO with key workflows. In addition, there was a need for roles and responsibility definition to ensure adequate accountability.

Recognizing these challenges as impediments to efficiency and risk management, Parris Whittaker strategically engaged Valenta to institute points of control and overcome these operational barriers with precision and attention to detail.

Approach

For addressing Parris Whittaker's operational challenges, Valenta's business consultants interviewed key process participants, systematically studied key processes, and assessed the nature and extent of information capture along the value chain. With a view to ensure scalability in operations and institute points of control, streamlined workflows were defined along with roles and responsibilities definition. This laid the groundwork for a smooth integration of InTouch CRM and CLIO. Furthermore, key reporting metrics were established for each are area of operation.

Processes in scope included Business Development (Sales and CRM), Legal Services for Corporate and Individuals, Partnerships, Finance, Human resource, Procurement, and IT.

Strategic Implementation

Valenta's comprehensive solution strategically addressed Parris Whittaker's challenges and aligned seamlessly with the expected outcomes:

Development of Standard Operating Procedures (SOPs)

- Defined standard operating procedures for key functions, encompassing core and support operations while ensuring that cross-functional dependencies are defined and aligned to ensure smooth and timely operations.
- Facilitated the transition from a people-dependent framework to a process-dependent framework aligned with industry best practices.

Effective Integration of Technology Infrastructure

- Ensured effective integration of InTouch CRM and CLIO into the operational framework.
- Recommended a series of functional improvements that can be made to the existing systems to enhance operating effectiveness and reduce manual intervention.

Streamlined Partner Selection and Onboarding Process

- Established precise guidelines and policies for partner identification, selection and onboarding, partner management, and termination.
- Instituted points of control to minimize strategic and operational risks that may arise with the addition of new partners.

Legal Services for Corporate and Individuals

- Documented procedures for key legal services provided to corporates and individuals with focus on legal procedures, stakeholder mapping, and responsibility, documentation requirements, average timelines, system input, and intended outcomes.

Guidelines, Templates & Formats for Operational Efficiency

- Provided tailored, comprehensive guidelines, templates, and formats to provide an overarching framework and support existing processes and systems.
- Enhanced clarity in processes, facilitating smoother workflow execution.

Creation of Knowledge Repository

- Developed a structured knowledge repository for easy reference, fostering a culture of knowledge sharing and continuous improvement.
- Ensured accessibility and relevance of information for ongoing operations.

Successful Adoption of Systems with Desktop Procedure Manuals

- Provided detailed desktop procedure manuals for each system, guiding team members through the adoption process.
- Facilitated workshops to ensure the successful adoption of InTouch CRM and CLIO.

Business Outcomes & Results

The collaborative effort resulted in streamlined processes, role clarity, and system alignment with the process leading to enhanced operational efficiency across various domains and functions and the establishment of a robust operating framework.

" Business Impact

The impact was significant, with a marked improvement in operational efficiency, reduced risks, and enhanced collaboration among different functions.