



## CASE STUDY

# London law firm Howard Kennedy comes up with an innovative “Capacity Solution” by integrating Kim Document and monday.com

Howard Kennedy is a London-based law firm that offers straightforward advice to clients including entrepreneurial businesses, and multinational corporations. They stand out for providing dual expertise in business law and private wealth, as well as providing legal services to major corporations seeking a more individualized approach.

Howard Kennedy’s Banking and Real Estate Finance team were asked by a specific client to exponentially increase the number of transactions that it could process in a short space of time. This surge in demand presented capacity challenges for the team. Fortunately, they found an innovative solution to boost work efficiency and free up the fee earners’ time.

## Challenge:

The Banking and Real Estate Finance team at Howard Kennedy encountered several challenges when a client requested they take on more work. The existing processes meant that they had reached capacity, necessitating either the recruitment of additional fee earners or process improvements. The primary issue lay in the process: each loan transaction needed to be manually transferred into the firm’s systems, involving transposing the information into 17 separate documents.

This manual approach was time-consuming and prone to errors, with reputational and other risks associated with these. Additionally, the requirement for extensive proofreading further extended the overall processing time, exacerbating the issue.

## Goals and Objectives:

The primary workload for this specific client involved a high volume of tasks with relatively low fees per matter. By addressing these challenges, the team aimed to eliminate the need for additional staff and free up valuable time for the lawyers to focus on higher value work.

Furthermore, they wanted to streamline the process through automation, meaning they could move the more low-risk tasks to non-fee earning assistants. Essentially, their goal was to automate the generation of the 17 required documents and seamlessly integrate this data into the firm’s monday.com platform, initiating the project management and tracking process.

## Solution:

Kurt Byrne, the business analyst leading the project, identified a practical solution by harnessing the existing tools within Howard Kennedy. Both Kim Document and monday.com, already deployed within the firm, held the key to resolving the capacity issue. Kurt's approach focused on addressing the problem itself rather than fixating on the technology. He engaged in meaningful discussions with the fee earners to understand their specific challenges, aiming to reclaim valuable time and enhance their overall experience.

The discussions centred on removing repetitive administrative processes and reducing the associated burdens. Kurt and the fee earners identified essential requirements, and Kurt managed the project expectations. As a result, they devised a solution in which Kim Document generates all 17 documents at the front end from a single Kim instruction form. The assistant enters all the relevant information into the form, and Kim automatically generates the full suite of documents. This approach then allows information to be extracted from vital data points within the documents and the required records to be created in monday.com.

Additionally, it triggers urgency indicators within monday.com. This combined integration of the two systems has significantly improved the process. The integration process and form development were completed within a total of 24 hours, much to the satisfaction of the fee earners.

## Results:

The client in this case provided feedback indicating that Howard Kennedy now completes matters 10 days faster than other law firms handling the same portfolio of work. This not only reflects positively on the firm but also supports these additional results:

- 90 minutes saved per matter.
- Assistants now manage some work previously done by a senior lawyer.
- The team handles higher volumes without the need for additional staff.
- The client account is more profitable and sustainable.
- Integration between Kim Document and monday.com reduces data rekeying.
- The process is fully automated.
- A shift towards a new way of working, not just Kim Document and monday.com.
- No need for developers; no coding required.
- A scalable solution that can be replicated for other clients and types of volume instructions.

*"Kim Document takes a unique approach by prioritizing engagement, genuinely collaborating with us, and delivering tailored assistance without the need for numerous project managers. Their team is genuinely dedicated to meeting your specific needs and offers flexibility to accommodate your preferences. Kim has assembled a group of professionals who understand your business, actively listen, support driving change, and adapt quickly without being hindered by layers of bureaucracy."*

**Tony McKenna, Director of IT and Change at Howard Kennedy**

## Conclusion:

In the journey to enhance efficiency and productivity for a specific practice group, Howard Kennedy undertook an innovative transformation by integrating Kim Document and monday.com into their workflow. This approach streamlined processes and delivered tangible benefits across their operations.

The results speak volumes: Customer experience is excellent, with a significant timesaving of 90 minutes per matter, the delegation of Partner work to non-fee earning assistants, and the practice team's ability to manage higher

workloads without increasing staff numbers. Notably, the client account remained both profitable and viable, demonstrating the sustainable nature of this solution.

Through a simple integration, the need for time-consuming data rekeying was eradicated, and the entire process was automated. Beyond the tools themselves, this initiative represented a paradigm shift in how work was approached, embracing a new way of working that emphasized adaptability and efficiency.

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