

Utilising Proclaim to support growth and service excellence

DAWN Advice is an independent charity which provides advice, negotiation and education programmes on both a regional and national basis.

The organisation currently employs over 100 staff at its HQ in Northumberland, delivering quality-assured legal advice to clients from all walks of life. DAWN Advice is a Social Enterprise (which means that it reinvests any additional funds raised) and a member of 'adviceUK', the UK's largest network of free, advice-providing organisations.

Liz Chadwick (pictured), Chief Executive at DAWN Advice, explains the organisation's decision to select Proclaim and her experience of the system since implementation.



When was Proclaim implemented, and how was the selection process made?

In early 2007 we were delighted to win a substantial LSC contract, which necessitated quite an increase in our staffing levels. We took this opportunity to revisit our internal procedures and IT systems, and realised that to manage our growth we had to embrace new efficiency models using technology.

We researched the marketplace and evaluated several 'case management' software systems. Our goal was to find a system that would help us to tailor how we managed caseloads, and pro-actively pave the way for increased efficiencies, reducing time-consuming administration.

Eclipse's Proclaim system stood out among the three solutions shortlisted as being by far the most customisable to our specific needs. Eclipse's experience in streamlining business processes appealed to us immediately. The system was also based upon a very cost-effective model which would enable us to scale up its usage as our staff number grew.

What day-to-day benefits do you see from Proclaim?

The 45-user system we invested in has since doubled in size, which speaks volumes for Proclaim's usefulness!

The main overarching benefit is the way in which Proclaim structures and organises our data. All of our caseworkers use Proclaim as their core desktop tool, and it gives them the ability to find any element of information easily, within any case, without having to trawl through paper files. The resultant time saving is huge and enables caseworkers to use their time far more productively in assisting our clients.

The system's information screens ensure that every bit of data required is collecting upon file opening. Although this may seem a minor point, by Proclaim 'forcing' caseworkers to do this, the time savings later on down the line when cases are in full swing can be massive!

How have you tailored Proclaim in line with your overall strategy?

Our in-house system administrators have access to the full suite of Proclaim tools, and this empowers them to amend practically every element of the software in line with our preferred ways of working. We've been very pro-active in tailoring the system, and this embraces the fairly simple (building in new data capture screens at case inception) through to more involved steps such as adding new documentation and workflow routines.

For example, we can create logic steps for 'incoming' items of case documentation so that when they are received, we can trigger a workflow to automatically suggest – or carry out – the next activity. This could be a straightforward reminder to call the client, or the automatic production of a follow-up document with no manual intervention required from the case handler.

These changes, and the ability to create business logic to further improve our processes, are invaluable in increasing productivity and ensuring accuracy in how cases are progressed.

Does Proclaim assist in managing reports and statistics?

Proclaim has an integrated reporting toolkit which we rely upon heavily for reporting to the LSC. By being able to create and reproduce reports at the click of a mouse, this element of our activities has been improved immeasurably. We can provide bespoke reports as and when required, and we can even schedule standard ones (using Proclaim's 'Automated Task Manager') to be run and distributed at set dates and times with no further intervention required from caseworkers.

In addition, the reporting tools are extremely useful for internal data and MI. Bespoke reporting enables our supervisors to create templates that we use to track workloads and case progress. By doing this we are alerted to any area where a case needs specific attention, for example where a particular deadline is drawing near.

Do you have any future plans that you'd like to share?

DAWN's newly streamlined processes and our efficient business model have enabled us to bid for, and win, a great many more contracts. In fact, we have outgrown our current premises at Horton Park and, to accommodate more staff, we will soon be moving part of the business to Longhirst Hall in Morpeth. Needless to say, Proclaim will be going with us!

Eclipse's approach to our requirements, willingness to listen, and ability to provide a flexible and extremely robust solution have convinced us that Proclaim is the definitive solution for legal services organisations.



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