

Client: Weightmans

What we do

We work with the world's leading law firms. We help them get the maximum value, opportunity and advantage from their critical business applications. Everything we do is designed to help each of our clients run a more efficient and profitable legal practice.

We have long-standing partnerships with Thomson Reuters Elite, Intapp and iManage. We're experts in their software as we've worked with it for years. At times we've even helped develop it.

We tailor everything we do to meet the individual needs of each of our clients. So, while our projects may share similar features, none of them are ever quite the same.

Our client: Weightmans

Weightmans is a Top 45 law firm whose business is growing rapidly. Their more than 1,200-strong team works from seven offices across the UK. They have a wide range of clients including many police, fire and local authorities, NHS trusts and a diverse range of owner-managed businesses and PLCs. They also provide a full family and private client service.

What they needed

Weightmans wanted to create more efficient processes and improve the quality of their data. In particular they wanted to minimize duplicate entities and aged records and their impact on, for example, reporting, conflict checking and AML.

To do this they needed to be able to merge functions across 3E and MatterSphere, merging in 3E while keeping both programmes synchronized.

What we did

We worked in partnership with Thomson Reuters Elite (TRE) to create a robust technical solution that would clean Weightmans' current data and enable them to maintain their data hygiene in the long-term.

To do this:

- ▲ We identified pairs of merge candidates within MatterSphere
- ▲ TRE managed overnight batching to merge each pair of candidates in MatterSphere and their equivalent entities in 3E
- ▲ We installed our custom-built extended merge tool to run site, address and relate merges in 3E
- ▲ We installed our custom-built bulk-processing 3E merge tool, which can run independently of the MatterSphere merge
- ▲ We set up easy-to-use processes so that Weightmans can continue to merge their entities in the long term

This collaborative approach meant we were able to complete the bulk of the merge within six months.

The software we used

Elite 3E, MatterSphere and our own custom-built 3E merge tools.

What they said

'Data cleansing is a major focus for Weightmans as we want to drive up data quality, and eliminate the problems and inefficiencies around duplicates, incomplete or malformed entries, and aged records. We needed a merge solution that coped with the particular constraints of our chosen systems and let us not only tackle the huge bulk task but also provide an on-going merge capability.

I was hugely impressed by the way Pinnacle and Thomson Reuters came together to share knowhow and resources to find a way through; they remained client-focused throughout, very engaged, very willing and ultimately very capable. We're in a position now where we're effortlessly merging large volumes of entities each day and will have all the bulk work completed less than six months after project kick-off.

Pinnacle's ability to extend the merge functionality to sites, addresses and relates has also been invaluable in accelerating the broader cleansing efforts. And it's reassuring to know that we can call on this sort of domain expertise to problem solve and fast-track us to a place we'd have struggled to get to on our own.'

Stephen Hepplestone, Business Change Project Manager, Weightmans

Can we help you?

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