



Assist Law

Client

Assist Law help and support people with end of life planning, providing a wide range of services including Wills, Funeral and Inheritance Tax Planning.

Mobile Situation

Assist Law have a team of 30 advisors across the UK completing face to face client consultations.

Project

Formworks for iPad delivered to 30 advisors and the digitisation of 7 complex interlinked data capture form templates integrated with the CRM system.

The Challenge

Client consultations require sensitivity and expertise. The process can also be lengthy, involving the collection of considerable amounts of detailed personal information.

The traditional consultation process involved the completion of long paper forms, some up to 20 pages. The forms were then posted back to the central administration team so that the data could be re-keyed into the systems to create the required Will or Trust documentation.

This process created service delays and a high administrative burden from re-keying and the requirement to follow up missing data, errors and lost forms.

The Solution

Utilising our Formworks mobile forms platform, we replaced the traditional paper process with secure iPad forms which are available offline and include data validation controls to ensure that required information is collected at the client meeting.

The iPad forms are easy to use and navigate and include time and date stamped signature fields for the client to sign and authorise on the spot.

The collected data is immediately transmitted from the field via the mobile network and automatically imported into the CRM administration system.

The Benefits

The Formworks solution has improved the quality of data captured during each client meeting, reducing the requirement for later rework or re-visits.

Significant savings have been made through the elimination of printing, lost paperwork and postage.

The service cycle time has been dramatically reduced by the electronic transmission of data from the field and the cost of processing cases has been cut through the elimination of data re-keying.

Most importantly, Assist Law has been able to improve their overall client experience and strengthen its competitive offer in the market.