



## CASE STUDY

# Taylor Rose deploys Kim to its 900 conveyancing team, reducing costs by over 50% and transforming its document generation and data capture processes.

Taylor Rose MW is a top 60 independent firm of solicitors with over 1,700 experts operating nationwide. From its 30 offices, Taylor Rose provides a full range of personal and commercial legal services. Focusing on smart, modern law, Taylor Rose constantly seeks best-in-class technology to support clients and team members.

The 900-strong Taylor Rose conveyancing team, consisting of employees and consultants, wanted to speed up document generation and, in the process, make it easier for their clients and their people. The team also needed a tool that was easy to use and maintain and quick to deploy and adopt.

## Challenge:

Faced with a significant increase in license and operating costs for their existing document automation tool plus the departure of their in-house expert, the Taylor Rose management team surveyed the market for an alternative. Their checklist of requirements reflected their experience with other tools. Once the minimum security, scalability, and functionality requirements were satisfied, ease of use, low-cost maintenance, and quick deployment were top of the list.

These priorities reflected the distributed nature of the conveyancing team, with many working flexibly from home and others from their 30 offices. The new tool needed to be intuitive and require little, preferably no, user training. It was also crucial that the maintenance and updating of the templates, plus the addition of new ones, were not time-consuming and did not require expensive and specialist resources.

## Goals and Objectives:

Taylor Rose has always been innovative and market-leading, having grown significantly both organically and through acquisition. Technology and data have always been key to the firm, but given its ambitions, they are now at the heart of its strategy. Any tool it selected to replace its existing provider had to have the flexibility, scalability, and roadmap to support the firm's plans. Critically, it had to have a data and integration model that allowed it to 'play nicely' with the firms' tech landscape.

## Solution:

Following market testing, Taylor Rose selected Kim. A key driver in this decision was Kim's ability to be invisible to users so that they did not need to learn another tool. Of the circa 900 users of Kim, only five actually see and use the Kim Workspace. All other users click a link in their existing practice management system, and a form opens that users complete to generate the required documents. This makes deployment and user adoption easier. Other factors that influenced the decision included Kim's no-code configuration, which reduces the total cost of ownership because it removes key-person dependency on experts who previously needed detailed product training.

With the conveyancing team generating many 1,000s of documents each month, key implementation and transition objectives were focused on minimizing business disruption, protecting revenue generation and maintaining a great client experience. The deployment risks increased materially when their existing supplier refused to extend the contract to allow parallel running during implementation. A project that should have taken 60-90 elapsed days had to be, and was, completed in half the time.

## Results:

The Taylor Rose and Kim teams automated a suite of five conveyancing documents in under 45 elapsed days, with a rolling release seeing the first document go live on day 10. The largest of the documents is circa 150 pages with complex insertions and exclusions (a typical final version has circa 100 pages). Kim's simple-to-use and maintain no-code rules engine defined all the dynamic content inserts. This engine enables over 200 assembly rules in a single document. Some rules perform multiple "if" statements against structured and unstructured fields in an intuitive user interface, and all the rules and inserts support the corporate-approved MS Word style - Table of Contents, List Styles with continuation of level numbering, and bullet lists continue in sequence. Benefits include:

- Fee earners spend less time reformatting templates/drafts.
- The document links are available from the existing practice management system and do not require users to learn another system.
- Template maintenance no longer requires a resource trained for many months in a proprietary markup language.
- All future changes can be managed in-house using the no-code solution, lowering the Total Cost of Ownership.
- Full support for a multi-stage drafting process to enable multiple updates to the same document since the process with third-party interaction can take many days.
- Fee earners can work concurrently with multiple clients, reducing contracting time.
- A reduction in the number of errors when creating documents.
- The data captured can now be reused in other systems, removing the need to rekey data.

*"A significant increase in license fees from our existing provider triggered our review of other tools. We're glad it did. It showed us what is now possible. Kim will help us digitize our operations and better serve our clients and teams. It saves us time and money and helps our business and IT strategy. We are excited by the opportunities."*

**Adrian Jaggard, CEO Taylor Rose**

## Conclusion:

Taylor Rose's decision to change its document automation tool was triggered by rising annual license fees plus the high cost and time involved with maintaining and updating templates. Working as an agile team, Taylor Rose and Kim halved Taylor Rose's license and operating costs and delivered the project in less than 45 elapsed days. There

were, of course, challenges and issues in delivering at such a pace. However, via Kim, Taylor Rose generates thousands of documents monthly with little business interruption. There were only five user issues during hyper care (representing less than 1% of the user population) and few change requests made to the templates post configuration.

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**Contact us at [hello@kimdocument.com](mailto:hello@kimdocument.com)**

**[www.kimdocument.com](http://www.kimdocument.com)**

