




LEE&THOMPSON

Enhancing Client Management with Power BI

Lee & Thompson are one of the UK's leading law firms for the media, technology and creative industries.

As law firm Lee and Thompson grew its business, its partners needed a better way to generate critical financial reports. The system they'd been using required their Finance team to run reports on demand as PDFs and manually analyse the data. This process was simply not agile enough to enable partners to make quick, intelligent business decisions about client accounts or work in progress. Chess recommended Power BI to Lee and Thompson as a new, faster way for partners to get access to up to date financial information about clients.

 Sector **Legal**

 People **65+**

Solutions

**Power BI, SQL
Services, Microsoft
365**

The Business Challenge:

In 2019 Lee and Thompson embarked on a migration to the Microsoft 365 eco system. Overseen by Simon Boyden, the firm's Chief Financial and Operations Officer, Rob Hilton the firm's Head of IT and in collaboration with Chess they worked towards improving the business's infrastructure.

More recently, this collaboration led to understanding the issues with Lee & Thompson's current reporting system, and consequently made their objectives for Power BI very clear:

- Provide partners with immediate, up to date access to reports on client fees
- Offer detailed views on cashflow and working capital
- Enable this data to shape decision making at a business level
- Eliminate the time needed to produce the reports and redirect the resource to commercial analysis and support

Find out more at ChessICT.co.uk

The Solution

Chess have been a long-standing IT partner of Lee and Thompson. As such they recommended leveraging their new M365 environment to provide the solution to the reporting problems with the addition of Power BI.

Over several collaborative sessions, Simon Boyden sketched out a visual scope of what he and the senior leadership team at Lee and Thompson wanted.

A new, single 'partner view' was needed to deliver valuable reports on work in progress and debt levels by client across the instructions the firm was dealing with.

Chess's Digital Account Director, Andrew Walker, was then able to interpret this outline requirement into a scope of work, comprising metrics, deliverables, timescales, project parameters and a costed fee proposal.

By fully scoping the requirement and then aligning it to the most appropriate tool, it rapidly became clear that considerable value could be added to Lee and Thompson's overall reporting capabilities.

“ From the outset, it was clear that Chess understood our business requirements. They were quickly able to show us how Power BI would address them. Our Account Director showcased the features of Power BI for us, highlighting what would be possible, even down to specific functionality such as hovering, drill down and data export on specific report interfaces. ”

Simon Boyden - Chief Financial and Operations Officer, Lee & Thompson



The Outcome

Through collaboration with Chess, Power BI has enabled Lee and Thompson's fee earning partners to derive on demand insights into client billing, work in progress and debtor management at a client and matter level.

Being able to access these reports via a user-friendly interface, quickly and easily, has significantly enhanced client management and decision-making processes at the firm.

“ The integration of Power BI has empowered our partners with up-to-date business and financial data, allowing them to make critical decisions for the whole of our practice. This in turn improves profitability which generates funds to invest in our people, technology and working environment. ”

Simon Boyden - Chief Financial and Operations Officer, Lee & Thompson



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By leveraging world-class technology, Chess helps you to connect your people, protect your data, grow your business, reduce your costs and work better together, which means your business, your people and your customers can thrive. At Chess, we're passionate about our unique culture and our continuous investment in our people to be industry experts.

We're extremely proud that our people voted us No.1 in 'The Sunday Times 100 Best Companies to Work for' list 2018, and we continue to celebrate more than ten years in the top 100.



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