Service Overview

FlightPath for Access Lawfusion Case Management

Together we'll land this implementation

FlightPath your Access software journey

We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation, how the system is rolled out is critical if full value from your new investment is to be achieved.

We also know that you may view new software implementations with some trepidation and many customers can find this period daunting. In fact for some customers, this may be the first software roll out they have managed.

We recognise this and we have designed our best practice, remote first implementation services to help ensure you have a great experience and are looked after along the way, so that the whole process is less daunting… this is our FlightPath implementation approach.

In this Service Overview we explain your options and what is contained within the FlightPath Packages available to help implement your software, along with the additional services you can opt to include.

Seamless implementation, delivered 100% remotely

Our FlightPath services have been designed to be remote-first, providing you with an improved low-risk implementation journey, no matter how your organisation is structured or wherever your employees are working.

We use video technology to facilitate face to face contact, so you still get the hands-on benefit of working with an Access expert and our years of software deployment expertise. We have also invested in product e-learning, so your users can learn our products at their own pace.
Our remote-first approach means that you have regular, accessible communication with us to keep you on track at every step of your journey and that your software can be delivered flexibly to suit the needs of your organisation and employees.

All our FlightPath consultants and on-boarders are not only certified in our products, they are also trained and certified in our remote-first FlightPath implementation methodology, including training in effectively delivering remote custom
er projects.
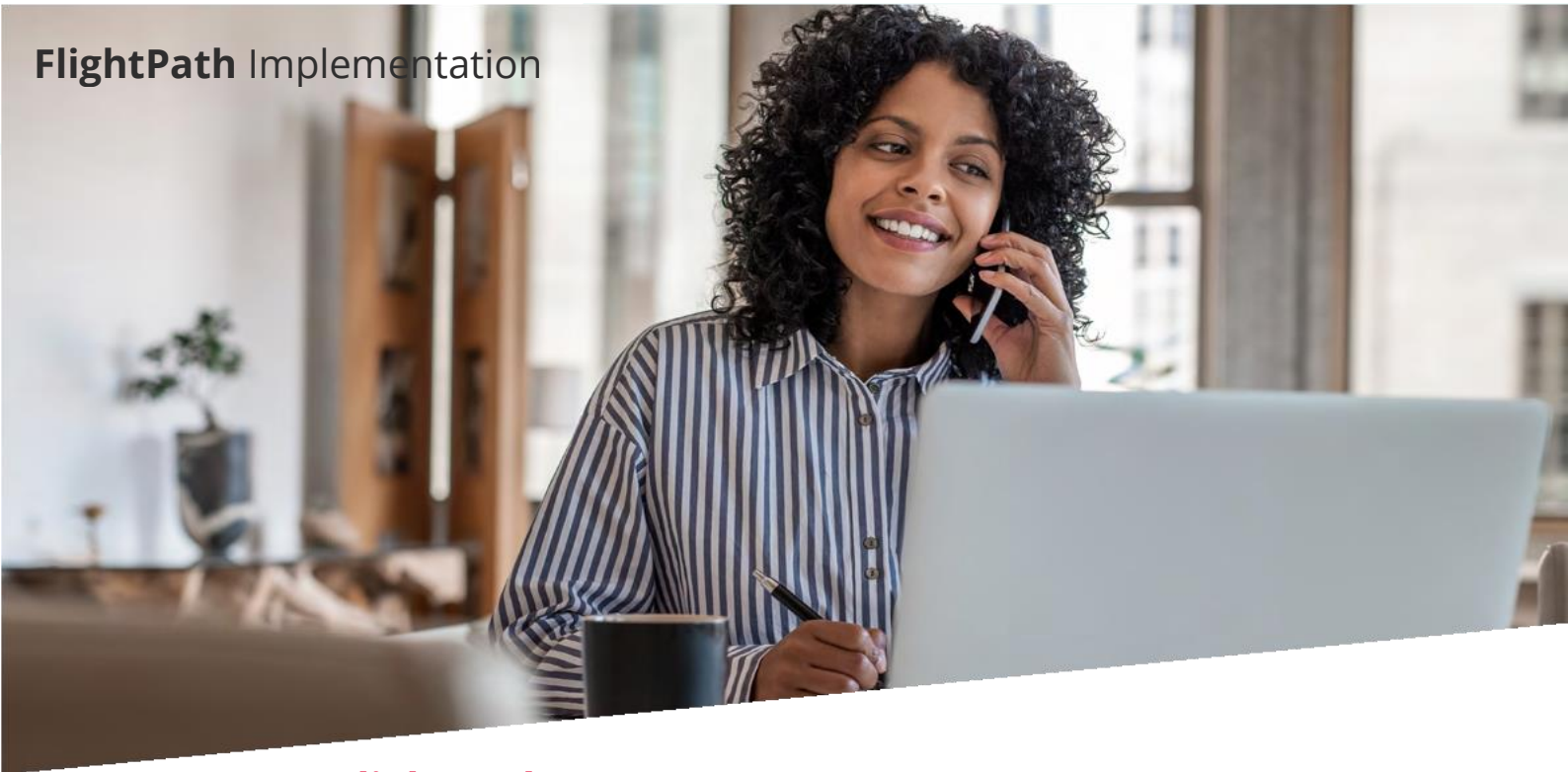
FlightPath:

your six-stage journey to success

We'll be sending you regular updates to keep you on track and ensure it is clear where you are on the journey - every step of the way.

6. Review

Check-in to see how you are progressing

5. Launch

Get the product into your colleagues' hands

4. Validation

Ensure all is working to your expectation

3. Learning

See what the product can do and train your colleagues

2. Preparation

Configure your systems in readiness

1. Getting started

Familiarise yourself with the process and product

You have control, but we are never far from your side.

Each FlightPath implementation programme from Access follows a well-defined journey with key milestones. These milestones represent – at a high level – the individual phases of your implementation journey. We'll be using these milestones to help us both track and communicate progress towards successfully launching to your users. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology. This is a journey based on best practice and designed to deliver timely value to you and your colleagues. And while it is ultimately your journey, we are here to support you all along the way.

Clear roles and responsibilities

At the 'Getting Started' milestone phase, you will receive a Welcome Pack. In here you'll find clarity on roles and responsibilities. What you'll need to do, and what we will do. Crucially our FlightPath approach also clarifies our joint expectations, helping us both understand the process that we will jointly commit to, in order to successfully launch your chosen software to your end-users in a timely and efficient manner.

Your onward journey

Even when your implementation has successfully landed, and you are in a position to go live with our software, we will ensure that you are successfully transitioned to the care of our Success Team. The Success Teams include our support colleagues and Customer Success Managers and will be available to support you as you use your software and realise the benefits of your investment in your Access Solution.

To ensure The Access Group can continue to support all our products, we have made sure 100% of our support teams can work securely and seamlessly from home. We have increased the capacity of our telephone system so support teams can be contacted wherever they are working using our usual support phone numbers.

FlightPath for Access Lawfusion

The tables below summarise what's included within the FlightPath packages. We will help you choose the package that's right for you but please review this table to ensure your understanding.

FlightPath A	FlightPath B	FlightPath C
Overview Implementation of Access Lawfusion to simplify and automate case management for law firms specialising in a specific industry. Pre-defined functions minimises the need for our Project Governance. This pathway is best suited to 1-10 user firms. This includes 1 User Training Session for up to 10 Users. You will also have access to the General & Quotes workflow as standard.	**Overview** Implementation of Access Lawfusion to simplify and automate case management for law firms specialising in a specific industry. Pre-defined functions minimises the need for our Project Governance. This pathway is best suited to 11-50 user firms. This includes 3 User Training Session for up to 10 Users. This includes the General & Quotes workflow as standard.	**Overview** Implementation of Access Lawfusion to simplify and automate case management for law firms specialising in a specific industry. Pre-defined functions minimises the need for our Project Governance. This pathway is best suited for larger user firms. This includes 5 User Training Session for up to 10 Users. This includes the General & Quotes workflow as standard.
FlightPath Content **Access Lawfusion Case Management Including:** Case Data Storage & Management, Maintaining Contact Database, Performing Actions, Carry Out Searches, Visibility Of Actions Performed, Task Management, Action Group Maintenance, Printing, Multi-User Case Access, Case Handler, Case History, Standard Reporting.	**FlightPath Content** **Access Lawfusion case management processes including:** Case Data Storage & Management, Maintaining Contact Database, Performing Actions, Carry Out Searches, Visibility Of Actions Performed, Task Management, User Management, Action Group Maintenance, Printing, Multi-User Case Access, Case Handler, Case History, Stand Reporting.	**FlightPath Content** **Access Lawfusion case management processes including:** Case Data Storage & Management, Maintaining Contact Database, Performing Actions, Carry Out Searches, Visibility Of Actions Performed, Task Management, User Management, Action Group Maintenance, Printing, Multi-User Case Access, Case Handler, Case History, Stand Reporting.
Included FlightPath Services Key service delivered include: Welcome Call, Environment Installation & System Set-Up, Document Alignment, User Training	**Included FlightPath Services** Key service delivered include: Welcome Call, Environment Installation & System Set-Up, Mail Merge, Document Alignment, Post Room, Case Tracker, User Training	**Included FlightPath Services** Key service delivered include: Welcome Call, Environment Installation & System Set-Up, Mail Merge, Document Alignment, Post Room, Case tracker, A2A Integration, User Training, Word Document Addition
Additional Services available Multiple User Training (Up to 10 Users), Postroom, Case Tracker, A2A Integration, Family Law Module, Debt Module, Immigration Module, General Litigation Module, Employment Module, Corporate & Commercial Module, Mental Health Module, Plots Sales Module, Crime Module, COP & Deputyship Module, Private Client Module, Conveyancing Module & Personal Injury Module, Project Management	**Additional Services available** Multiple User Training (Up to 10 Users), Postroom, Case Tracker, A2A Integration, Family Law Module, Debt Module, Immigration Module, General Litigation Module, Employment Module, Corporate & Commercial Module, Mental Health Module, Plots Sales Module, Crime Module, COP & Deputyship Module, Private Client Module, Conveyancing Module & Personal Injury Module, Project Management	**Additional Services available** Multiple User Training (Up to 10 Users), Family Law Module, Debt Module, Immigration Module, General Litigation Module, Employment Module, Corporate & Commercial Module, Mental Health Module, Plots Sales Module, Crime Module, COP & Deputyship Module, Private Client Module, Conveyancing Module & Personal Injury Module, Project Management

Greater detail can be found in the tables on the following pages.

Product features enabled per FlightPath package for Access Lawfusion

Feature	Summary	FlightPath A	FlightPath B	FlightPath C
Case Data Storage & Management	Ability to use Workflow processes	●	●	●
Maintaining Contact Database	Creating new and managing existing contacts	●	●	●
Performing Actions	Ability to produce a document/letter/form/email, create a PDF bundle of documents, record calls and incoming mail, copy in external documents, diarise a task	●	●	●
Carrying Out Searches	Ability to search for existing cases or contacts, perform standard query searches across cases, export search results	●	●	●
Visibility of Actions Performed	Ability to see and administer the chronology of the steps which have been carried out on the case using the last steps	●	●	●
Task Management	Ability to set, view and manage diaries/automated reminders linked to or independent of case activities	●	●	●
User Management	Management of global system settings and individual user settings		●	●
Action Group Maintenance	Ability to allocate an action to a group to make it easier for users to find letters and tasks in Main Case Handling	●	●	●
Printing	Ability to print data saved on a case either using direct printing or print queue functionality where print jobs are stored in an Access Lawfusion queue, which the user can administer prior to sending to the printer	●	●	●
Multi-User Case Access Functionality	Ability for more than one user to access a case at one time	●	●	●
Case Handler Maintenance	Ability to create and amend fee earners/case handlers	●	●	●
Case History	Ability to interrogate the History of cases within Access Lawfusion to produce reports on the work which has been carried out on those cases by specific users	●	●	●
Standard Reporting	Ability to run reports included in a standard suite of reports	●	●	●

Product features enabled per FlightPath package for Access Lawfusion				
Feature	**Summary**	**FlightPath A**	**FlightPath B**	**FlightPath C**
Post Room	Users can add documents to their Cases sent via the Post Room from a configured scanner directly into a Fee Earner's folder/mailbox and the files are moved to the Post Room, where they can be sorted and distributed to the user's Priority Actions List		●	●
Case Tracker	Website based system giving your Lawfusion clients an almost real-time update of their Cases without having to contact you, and documents can be transferred easily using the Case Tracker. Third parties (eg Estate Agents) may also have access to relevant information if required		●	●
A2A Integration	Lawfusion's integration allows low cost claims to be submitted directly from the Case using the A2A portal for Employers' liability, Public liability and Road Traffic accidents. Notifications and documents are received directly into the Case without the need to access the A2A			●
SMS	Send both configured and ad-hoc SMS text messages to Clients and third party contacts directly from a Case			●

access
freedom to do more

Implementation Services included in FlightPath for Access Lawfusion

		FlightPath A	FlightPath B	FlightPath C
Welcome Call	Your on-boarder will contact you to familiarise you with the journey	●	●	●
Environment Installation & System Set Up	We install your solution and set up your users	●	●	●
Check In Call 1	Ensuring that we have all relevant documentation & answer any queries the customer may have at this stage		●	●
Mail Merge/Word Customisation	We create your digital letterhead so that you can send branded electronic correspondence	●	●	●
Document Alignment	We convert our standard letters into the format that you provide	●	●	●
Post Room Set-Up	We will set up the scanner to enable post to be sent directly to a user's folder/mailbox		●	●
Case Tracker	We set up and configure the Case Tracker essentials, and work with you to ensure that your clients access the correct information		●	●
A2A Integration Set-Up	We set up your A2A credentials with your Access Lawfusion workflow/procedure to enable your users to upload cases to the portal			●
SMS	We configure your SMS account into Access Lawfusion to enable SMS text messages to be sent directly from a case			●
User Training	We will deliver a training session to super-user showing you how to get the best out of your Access Lawfusion case management software	●	●	●
Check In Call 2	Ensuring that customer is happy with the training and answer any queries that they have following that		●	●
Post Room Training	We will complete training for of usage the Post Room functionality		●	●
A2A Integration Training	We will run through the			●
Go-Live Support Session	We will provide support to a super-user to ensure that they have understood the training and handover the customer to our support team	●	●	●
Word Document Addition	We will add up to 30 documents per customer, if you would like more you will need to purchase that as an additional service			●
		FlightPath A	FlightPath B	FlightPath C

Additional Services available for Access Lawfusion

On top of the services included within the standard FlightPath packages, the table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these & please note that these will be delivered as a second phase after you are live with your standard Flightpath

Multiple User Training	Basic User Training for up to 10 users
Post Room	We will set-up our Post room functionality & train you on using it
Case Tracker	We will set-up our Case Tracker functionality & train you on using it
A2A Integration	We will complete your A2A Integration
Family Law Module (1 Workflow)	We will complete a one-to-one training session on our Family Law Workflow
Debt Module (1 Workflow)	We will complete a one-to-one training session on our Debt Workflow
Immigration Module (1 Workflow)	We will complete a one-to-one training session on our Immigration Workflow
General Litigation Module (1 Workflow)	We will complete a one-to-one training session on our General Litigation Workflow
Employment Module (1 Workflow)	We will complete a one-to-one training session on our Employment Workflow
Corporate & Commercial Module (1 Workflow)	We will complete a one-to-one training session on our Corporate & Commercial Workflow
Mental Health Module (1 Workflow)	We will complete a one-to-one training session on our Mental Health Workflow
Plots Sales Module (1 Workflow)	We will complete a one-to-one training session on our Plots Sales Module
Crime Module (1 Workflow)	We will complete a one-to-one training session on our Crime Workflow
COP & Deputyship Module (2 Workflows)	We will complete a one-to-one training session on our COP & Deputyship Workflow
Private Client Module (Including Probate, Wills & LPA) (3 Workflows)	We will complete a one-to-one training session on our Private Client Workflow
Conveyancing Module (Including Sales, Purchase, Re-mortgage & Commercial Property) (3 Workflows)	We will complete a one-to-one training session on our Conveyancing Workflow
Personal Injury Module (Including Personal Injury, Medical, Negligence & Indusial Disease) (3 Workflows)	We will complete a one-to-one training session on our Personal Injury Workflow
Project Management	You will have the option to purchase additional Project Management time

About The Access Group:

The Access Group has been recognised in The Sunday Times Tech Track 100 in 2019 and is a leading provider of business software to mid-sized UK organisations. It helps more than 32,000 customers across commercial and not-for-profit sectors become more productive and efficient. Its innovative Access Workspace cloud platform transforms the way business software is used, giving every employee the freedom to do more.

Established in 1991, The Access Group, with an enterprise valuation of over £1billion, employs more than 2,300 staff.

For more information about The Access Group, visit: **www.theaccessgroup.com**