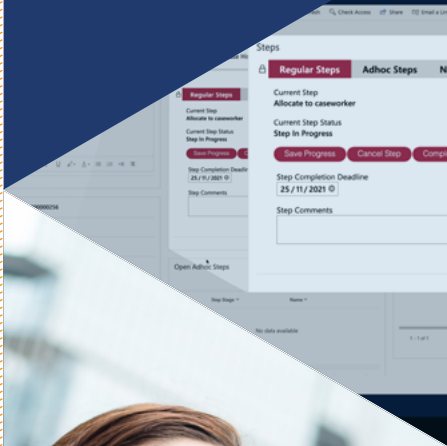**smart**impact
Intelligent solutions

smart
**cases**

# Solicitors Regulation Authority...

**Raising the standard for excellent customer service**

The Solicitors Regulation Authority (SRA) work in the public interest, regulating solicitors and law firms in England and Wales.

They protect and help the public by making sure solicitors and law firms meet our high standards and taking action against solicitors when appropriate.

Solicitors
Regulation
Authority

# SRA provides three core business services:

- Authorisation (AU)
- Client Protection (CP)
- Disciplinary (DC)

Historically, these services were being delivered on outdated legacy IT systems. In 2017, SRA started to replace these ageing IT systems with Dynamics 365 CRM and built a customer-facing front-end, called *mySRA*.

The project was scheduled to launch in January 2020, but there had been many complications, many delays and a loss of confidence in the supplier.

As there were many future phases needed for the same new Dynamics platform, SRA needed a clever strategy to get their first project live, while in parallel building robust Dynamics functionality, which could then integrate when the first project was finally ready for use.

So they turned to **smart**impact.

## A proven track record was essential

SRA appointed **smart**impact as their preferred partner because of our MS Dynamics expertise and our proven track record of working with regulatory bodies with similar requirements.

Because we are experienced in secure Case and Document Management and had delivered similar projects, most notably for The Bar Council, we were able to show SRA how our solution could work for them.

## Key areas of focus

**Highly secure case management** integrated with SharePoint for document storage.

**Unified security model** so users had identical privileges in both SharePoint and Dynamics from a single control panel.

Ease-of-use additions to enable **drag-and-drop document management** across Dynamics and SharePoint.

**Document building** functionality to enable cases to be reviewed by third parties and tribunals.

**Full data migration** from source systems which were in a state of flux.

**Integration** to their website and other SRA systems.

*Innovation, desire and hard work can deliver amazing results*

ICT Director, Solicitors Regulation Authority

# Project delivered successfully, and entirely remotely

Without wasting any time, **smart**impact set to work in early March 2020. Aside from the complex functionality that was required, **smart**impact had to work with several of SRA's outsourced companies for testing, integration, migration and QA. Another challenge was working within extremely tight timescales to coincide with various annual cycles and lockdowns, and so as to not delay the project any further.

Due to COVID-19, we were unable to be on client site, so the project was delivered entirely remotely. Despite it being complex tech in a complex environment, everything went brilliantly well. Needless to say, this was considered a huge achievement by both parties.
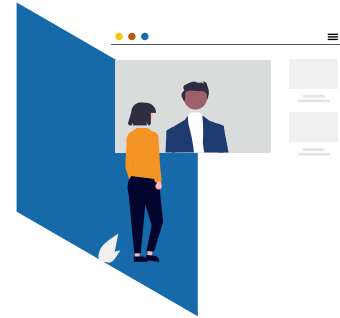
## Keys to success

So, what went particularly well? **Firstly, the project was delivered on time, and on budget.** However, other crucial factors played a big part in the success too:

Our very strong consulting team was led by a focused Project Manager and Head of Delivery, whilst SRA assigned an excellent Program Manager and team.

Communication lines were clear, issues were identified and handled as swiftly, and decisions were made in a timely manner.

Based on previous experience, we knew it was best to include the security model implementation as core at the beginning of the project, not at a later stage, as we had been asked to do. This proved to save time and avoid issues in future phases.

We held detailed discussions with SRA Procurement to find innovative financial and commercial approaches to working together, and this helped dramatically reduce the budgets needed to deliver this and other projects **smart**impact has worked on with the SRA

**Establishing a good working relationship has led to multiple follow-on projects which is both much lower risk and much more cost effective for both parties.**

*Using our experience to change the customer's way of thinking to get to a better result, is exactly what good partners like us should be expected to do.*

Enterprise Engagement Manager, **smart**impact
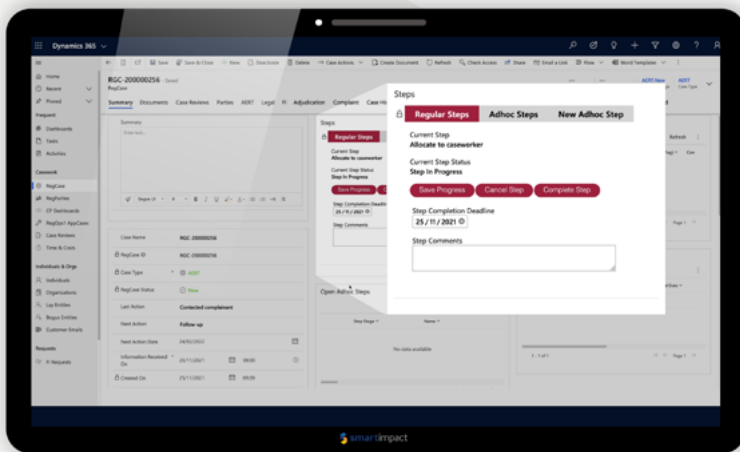
# Solution summary

### smart
# cases

For managing investigations, audits or general enquires and complaints.

### smart
# membership

To manage member details, new members and new membership schemes, subscriptions and renewals.

### smart
# connector

For easier integration with the website, Sage finance system and Dotdigital email marketing system.

## And finally... a solid platform for future enhancement and innovation

Now with a fully integrated and reliable system, SRA has a robust platform, which is future-proofed and means they and **smart**impact can continue to implement their enterprise-wide system strategy.

Crucially, **smart**impact's unique and powerful security model means that data and documents can be shared and secured across Dynamics and SharePoint in an easy-to-use and easy-to-manage, ultra-secure environment - vital for any regulator.

## Has this got you thinking about your own transformation project?

**Get in touch** if you'd like to discuss new ideas and ways of working. Wherever you are in your digital transformation, sign up for a **free 2-hour consultation** with our Transformation Consultants.

**Book a free consultation**

![smartimpact Intelligent solutions]

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