

Barings Law

# The verdict's in: Zoho One delivers powerful case management tools



[zoho.com](https://www.zoho.com)



# The Company

**We make justice  
accessible to all**

A decorative graphic consisting of a 10x10 grid. Two red four-pointed stars are positioned on the grid, one in the upper right quadrant and one in the lower right quadrant.

Barings Law is a leading law firm based in the North West of England with a largely litigious focus. Representing around half a million clients across thousands of claims, Barings holds data-breaching corporates to account and champions the rights of consumers who have been mis-sold financial products or subjected to undisclosed commissions and hidden fees. Believing everyone deserves access to professional legal representation regardless of their financial position, background or location, the team also helps immigrants fleeing war-torn countries with pro-bono asylum applications.

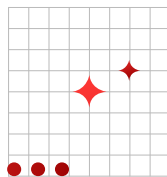
We spoke to Melanie Cope Machial, Head of Marketing and Technology, and Jessica Howkins, Digital Marketing Executive, to uncover how Barings' Zoho One implementation has revolutionised case management, customer service, marketing communications and more, to help it achieve excellence in the legal industry. As Melanie explained, "Technology is not quite where it needs to be to support most law firms, so thank goodness we found Zoho."

# The Challenge

Replace a "dinosaur" case management CRM with a scalable, well-integrated alternative



Everything was  
**disjointed,  
disconnected...**



## Melanie Cope Machial

Head of Marketing & Technology

One of the most troublesome platforms in Barings' legacy tech stack was its case management CRM, Proclaim, which was clunky, difficult to customise, physically hosted on a server in the office and poorly integrated with other applications it was using. Known as the "dinosaur software" by the team of legal professionals, Proclaim's tired and restricted user experience was becoming inhibitive to growth.

Alongside Proclaim, Barings was also using Pipedrive CRM for claims where the cost billing was less specific. Here too the software was siloed from other applications in use and the team were finding that they needed a raft of developers for even the smallest changes, which was costly, slow and infuriating. Melanie knew there had to be a better way and presented the case for a replacement platform to Barings' internal stakeholders.



## Melanie's must-haves for a new CRM:

- ◆ To manage the firm's entire caseload from onboarding through to litigation and settlement
- ◆ To be cost-effective and facilitate a do-it-yourself implementation process
- ◆ To be highly customisable without requiring developer intervention
- ◆ To automate bulk actions and repetitive tasks
- ◆ To record and track every client interaction, including phone calls, emails and questionnaire responses
- ◆ To boost customer service by capturing client feedback inside a custom 'Reviews' module
- ◆ To integrate with peripheral software such as document signing applications and file management systems
- ◆ To protect client information with uncompromising security features
- ◆ To provide transparency of data for easy auditing
- ◆ To allow agents and paralegals to work from home via a cloud-based platform

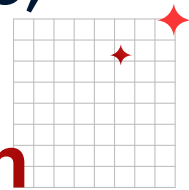
The resulting investigation into a replacement CRM was to kick-start the company's successful Zoho One journey, revolutionising not only its case management process but simplifying scores of other digital operations too.

# The Solution

Zoho One combines a mighty CRM with a wealth of other winning applications to drive growth

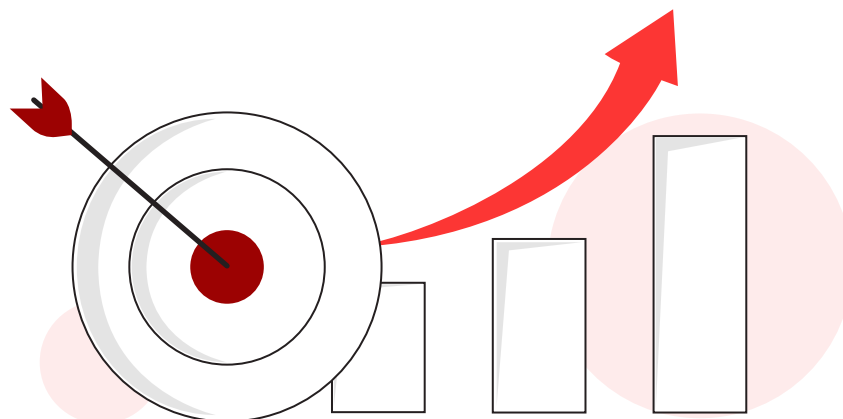


Since moving over to Zoho,  
we've been able to  
**double our caseload on  
a monthly basis**



**Melanie Cope Machial** - Head of Marketing & Technology

After seeing Zoho live in action at a partner firm, Melanie arranged a demo call with a Zoho technician. She was delighted to discover not only a powerful and dynamic CRM capable of meeting Barings' entire needs but a complete suite of programs within the Zoho One bundle that surpassed other tech used elsewhere in the business. Although Melanie had been evaluating Salesforce's technology, Zoho's low-cost, extensive package of native apps immediately sidelined the software with its hefty integration fees and requirements for specialist support.

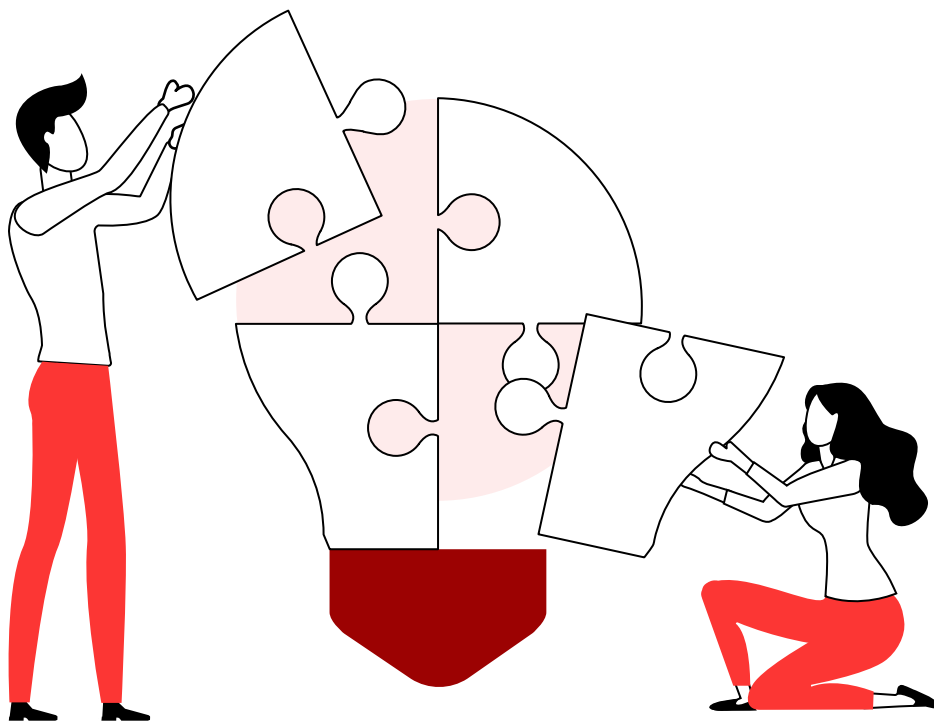


Beginning with CRM, Barings built a tightly integrated end-to-end case management platform to onboard clients, collect information, maintain communication throughout a claim's lifecycle and to action settlements. Every interaction is now logged automatically inside each client's record, acting as a central point of knowledge. This not only enables Barings' customer service teams to provide a seamless experience to clients around the clock but is essential to help the firm sail through its annual audits. Zoho CRM also provides an insightful Kanban view of Barings' legal pipelines, whilst its easy automations and workflows have helped the team bypass many menial tasks. Melanie credits "the power that automation gives us as a firm to bulk process so many cases" with giving "our teams the ability to focus on the legal stuff, which is what really matters at the end of the day".



By embedding Zoho Sign and Zoho Workdrive functionalities inside client records, the business has enhanced CRM's capabilities even further. Barings moved from DocuSign to Sign to automatically track the signing of witness statements and legal documents sent en-masse to claimants, lenders and defendants. And Barings abandoned its old online file management system in favour of Workdrive, which is used to store important case files securely in a way that mirrors the corresponding CRM records. Both Sign and Wordrive come as standard with the Zoho One package, which allowed Barings to not only streamline several processes but to eliminate two expensive subscription costs from the outset.

The firm's telephony system was also integrated with Zoho CRM ("really easy to do" assures Melanie) as part of a 'Reviews' custom module built to improve customer service. A CRM workflow now auto-emails clients after any phone call lasting more than 60 seconds, to capture real-time interaction ratings. This has enabled the business to gather rich Management Information and also to speedily identify unhappy customers, meaning that Barings agents can take immediate steps to mitigate any complaint before it escalates. Of this functionality, Melanie says "We're trying to be proactive, and Zoho CRM allows us to do that by contacting the client straight after that initial phone call...we've found we can turn unhappy clients into happy clients and...some of our complaint resolution times have gone down from between two and three weeks to two, three days because it's just so much more efficient."



The entire Zoho CRM implementation with its extensive automations and integrations was built entirely in-house by Barings' team, saving the business money but also empowering them with the knowledge to easily customise any aspect of the platform to their needs. Melanie says "There's not really any limitations to what we can do...if someone has an idea they go 'right well, let's go speak to Mel because I'm pretty sure we'll be able to do something like this.'" And where third-party software integrations such as Formstack have been required, Barings has also leveraged the included Zoho Flow application to easily make those connections and build inter-app workflows.

Now free of the constraints of an on-site server, Barings employees have been able to adapt to a post-pandemic world using Zoho's cloud-based CRM and its integrated applications. "Zoho has really empowered us to give our staff the opportunity to work from home securely," says Melanie. And security is indeed paramount for the firm, which stores thousands upon thousands of customer records across its digital estate, many with sensitive financial details. Barings can instantly grant and revoke access and permissions to all of its applications from One's central dashboard and have been able to force enable multi-factor authentication at login to gain complete peace of mind.

## Zoho One for Legal Marketing



Now that we've packaged everything together,  
**we've cut down our costs significantly**



**Jessica Howkins**

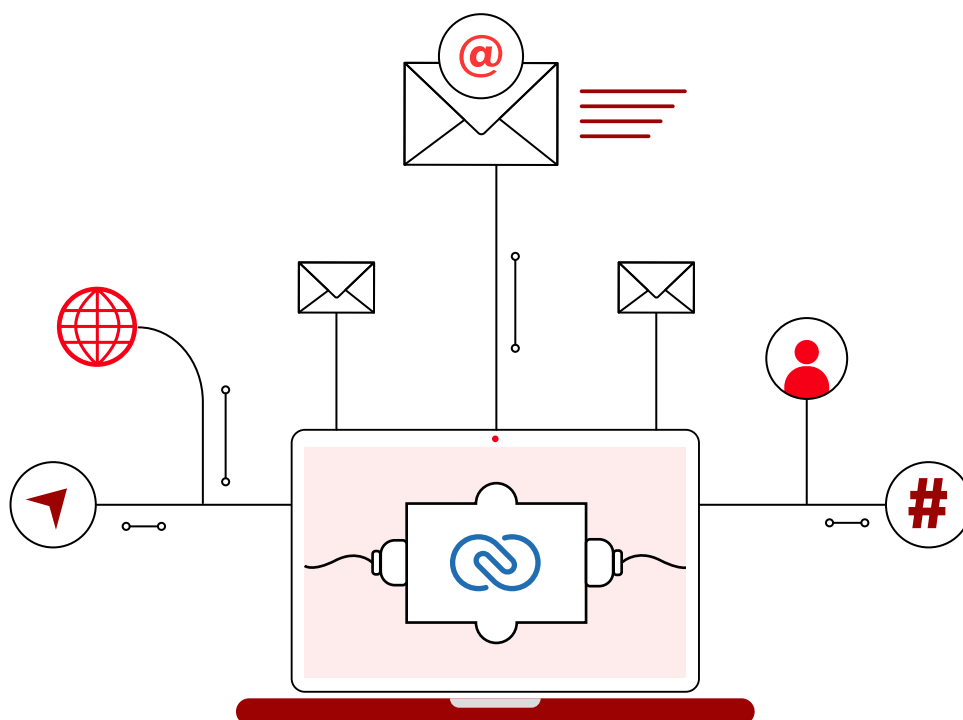
Digital Marketing Executive

Whilst Zoho One has empowered Barings' administrative functions, it has also elevated its marketing activities. Jessica is responsible for creating and executing all of Barings' e-shot and social media campaigns - no mean feat when you work for one of the UK's leading law firms. "I manage around half a million clients in terms of pushing out content" she explains. But with Zoho's marketing tools on side, her role has become significantly more manageable.



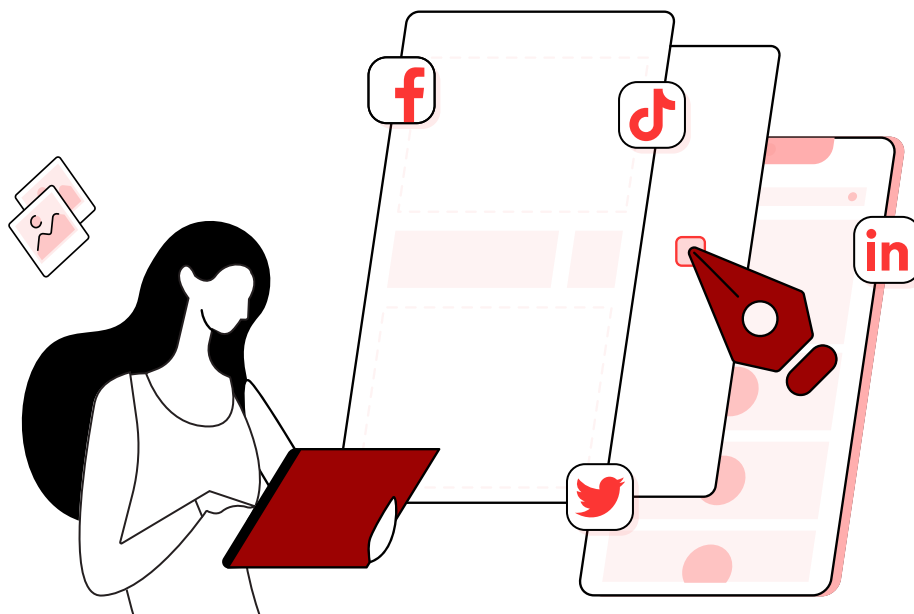
Adopting Zoho Campaigns, Jessica moved her mass-mailing capabilities away from MailChimp and Sendgrid and shunned Sprout Social in favour of Zoho Social for social media management. Zoho Campaigns alone has saved her marketing budget around £20,000 per year and Social £250 per month.

Campaigns is used to send Barings' subscribers promotional emails, including newsletters and topical legal updates, but also transactional and information-gathering emails. Many cases require clients to submit personal details, be it a vehicle registration number or the submission of a form of ID. Campaigns' native integration with Zoho CRM means that Jessica can create custom links to a client's record and embed it inside a campaign, navigating each recipient to a tailored and pre-populated form where they can simply fill in the required gaps in information.



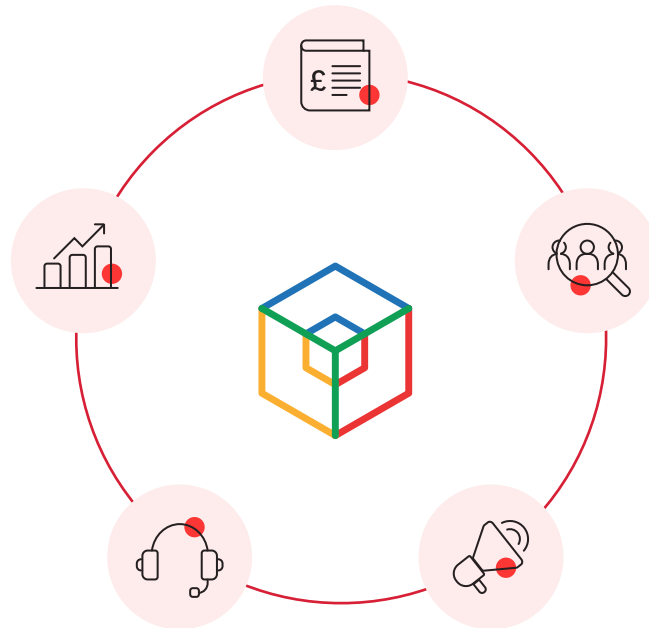
"The automation from CRM into Campaigns...saves me so much time" she explains. Plus, all emails sent via Zoho Campaigns sync to each client's record inside CRM, with their engagement actions visible to the firm's customer service agents - a helpful asset during follow-up calls.

Jessica relishes the many useful features that Campaigns offers, including CRM criteria segmentation for hyper-targeted communications, batched sending, grammar checks, pre-designed templates, drag and drop creation elements, campaign cloning, easy call-to-action buttons and merge tags, with bespoke content to each recipient. "If I'm sending out an email to 2,000 people who all need something individually tailored to them, I have the ability to do that" shares Jessica.



Meanwhile, Barings has been able to orchestrate its Facebook, Twitter, LinkedIn and TikTok presence from Zoho Social. Without having to log in separately to each platform, posts can be pushed live across each account from one central dashboard and engagement across each can be monitored with instantaneous notifications. Jessica also takes advantage of Social's inbuilt calendar, which alerts her to any inconsistencies in posting frequency and content clashes. And she especially enjoys the application's reporting facilities, which help her track KPIs such as impressions, interactions, page follows and more, saying "It's great for me because I know what I'm doing right and what I'm doing wrong."

# About Zoho One



Developed as the ultimate "operating system for business", the Zoho One bundle is a collection of 55+ integrated applications that cater to every diverse need of a modern business. From Sales to Marketing, Customer Support, HR, Operations, Finance and Legal, Zoho One's powerful suite of tools can be relied upon by every department to improve performance, enhance collaboration and streamline processes. An unrivalled yet affordable solution, Zoho One's cloud-based apps bring extraordinary value to any organisation.

Please find out more via our website: <https://www.zoho.com/one/>



