

Post Partner

CASE STUDY:

your Conveyancer

BACKGROUND

Your Conveyancer is a large conveyancing firm based in Scotland, led by Adam Forshaw and Martin Bourke. The firm utilises Visual Files as its central CMS, handling thousands of documents daily.

Post Partner, founded by Tom Bailey in 2019, builds document and data automation solutions for law firms. It integrates with major conveyancing case management systems including Proclaim, Redbrick, LEAP and Visual Files. Its products reduce manual effort and improve accuracy, enabling fee earners to spend more time on clients and matters.

THE PROBLEM (PRE POST PARTNER)

Before Post Partner, post handling at Your Conveyancer relied on bespoke scanning software and single document scanners requiring a team of four to five staff.

Patryk Czarnecki, IT Manager at Your Conveyancer, describes it:

"They were single document scanners and they frequently failed. There was no automation and no allocation. Everything went into one allocation list and the team had to index every document manually."

THE SOLUTION

Your Conveyancer replaced the old setup with Post Partner's OPR solution, alongside two Ricoh FI-8930 scanners. Instead of one general pile, incoming mail is now sorted into labelled trays by document type: Mortgage Offers, Mortgage Deeds, Questionnaires, Redemption Statements. Each tray maps to a configured job, so a whole batch can be loaded and scanned in one go, with allocation and indexing handled automatically.

The result is a simple three step workflow: sort the post into trays, scan each batch, and let the software allocate and index everything to the right matter in Visual Files. The integration with Visual Files needed only minor polishing, so documents flow into the system seamlessly.

SUMMARY

We helped Your Conveyancer to:
- Reach 95%+ automation
- Free up nearly 50% capacity
- The most effective post team in conveyancing
- Scale with rapid growth

CONTACT US

E: info@postpartner.co.uk
W: www.postpartner.co.uk
T: 0800 074 5419

"We can put 150 Mortgage Offers on the tray, press start and it will just do it.

The volume in one go is crazy. It is a game changer compared to the old scanners."

Patryk Czarnecki - IT Manager

The system now achieves upwards of 95% automated allocation and indexing, a figure that stands as best in class for a post room operating at this volume. Matching on matter references and postcodes is harder than it sounds: zeros and Os, Bs and 8s, missing spaces and addresses split over two lines all cause problems. Rules based automation, configured and continually tweaked, delivers a result the team can trust.

HOW IT WAS DELIVERED

The change was instigated by Adam Forshaw, who had seen a different approach to post room operations work well elsewhere. Tom Bailey visited the office to explain how the solution would work, two Ricoh machines were ordered, and Patryk installed the software and configured the jobs to fit the firm's conveyancers with Tom's help.

Much of the solution worked out of the box, with configuration focused on where each document type presents its matter reference or post code. The group scanning approach was then shaped on the ground by Sabrina Scullion and the scanning team, working with operational and support managers. Cascading jobs were later introduced to cut clicks even further, letting the software jump automatically to the next document type in the queue.

Ongoing support is built around self sufficiency backed by expert help. Patryk holds admin access to OPR, so day to day configuration changes are made in house, and every working configuration is backed up before anything changes, giving the firm a known good setup to restore at any time. For anything more advanced, Patryk has a direct line to Tom Bailey, and most issues are diagnosed and resolved within a single remote session.

THE RESULTS

The scanning team has been reduced from five people to three (in practice around two and a half full time equivalents), releasing capacity of nearly 50% into other roles across the firm. Throughput has risen at the same time, and with the firm growing rapidly, a third Ricoh scanner has already been ordered to handle increasing volumes.

The impact reaches well beyond the post room. Documents are named consistently, so fee earners always know where to find them, and auto acceptance has removed a manual step entirely. Fee earner time is the firm's most valuable and most measurable resource, and removing unnecessary administration is where the biggest wins sit. For Patryk, the ongoing relationship matters just as much as the numbers:

"I am really happy with the solution, how quickly we can resolve issues and how quickly we can add new things, like the cascading jobs. We are excited to continue working with Post Partner."

> *"We do not expect 100%. If we scan 200 documents and just three require human intervention, we are totally fine with that.*
>
> *95% plus is what we achieve, and it has streamlined the mail and the indexing for us."*
>
> Patryk Czarnecki - IT Manager

> *"The support has been excellent. I have a direct line to Post Partner, and if something needs looking at they will jump straight on a remote session with me.*
>
> *We will run a couple of tests together, they will spot the issue and fix it there and then. Job done."*
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> Patryk Czarnecki - IT Manager