



# The Legal CM Suite:

Revolutionising Legal Practice  
with Integrated Solutions

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# The Legal CM Suite: Revolutionising Legal Practice with Integrated Solutions

## Executive Summary

In an increasingly digitised and competitive legal landscape, law firms are under immense pressure to optimise operations, ensure stringent compliance, and deliver exceptional client experiences. The reliance on fragmented systems, manual processes, and outdated technologies often leads to significant inefficiencies, communication bottlenecks, and missed growth opportunities. The Legal CM Suite, developed by Property Marvel, offers a unified, cloud-native platform that seamlessly integrates core case management with specialised, powerful applications for automated reporting. While the **Legal CM Case Management System** contains its own robust Quotation platform and e-signing engine, Property Marvel also offers **LegallyQuoting** and **SignatureMarvel** as standalone, powerful tools for firms who prefer not to change their existing Case Management System (CMS) but still desire access to advanced quoting and e-signing capabilities. **Report On Title, by Property Marvel (PM-ROT)** is integrated with Legal CM, and is available to any firm as part of Legal CM Suite. This whitepaper details how the Legal CM Suite, along with these complementary tools, provides a strategic advantage, enabling firms to dramatically streamline workflows, reduce operational expenditures, elevate client satisfaction, and solidify their market position in the modern legal era.

## The Evolving Landscape and Persistent Challenges for Law Firms

The legal industry is undergoing rapid transformation, driven by client expectations for transparency and digital interaction, alongside regulatory demands for robust compliance. Many law firms, however, continue to face systemic challenges that impede their growth and efficiency:

- **Operational Inefficiencies and Time Drain:** A significant portion of a firm's valuable time is often consumed by manual data entry, repetitive administrative tasks, and the physical management of paper files. This not only leads to substantial time wastage but also increases the likelihood of human error, impacting accuracy and productivity.
- **Suboptimal Client Communication and Engagement:** Clients today expect immediate access to information regarding their case status. A lack of real-time updates frequently results in a high volume of inbound calls and emails, diverting staff from core legal work and often contributing to client frustration and negative feedback.
- **Constant, tiresome demands for case updates from estate agents and introducers drain away staff time.** Failure to provide access to real-time updates drive up the volume of calls and emails from these interested parties, who in turn communicate with clients in a negative way, creating an atmosphere of dissatisfaction.

- **Navigating Compliance and Risk Management:** Inconsistent document control, fragmented data storage, and non-standardised reporting practices can expose firms to considerable compliance risks, making audit trails difficult to maintain and potentially leading to regulatory penalties or reputational damage.
- **Ineffective Business Development and Onboarding:** Manual or slow quoting processes can lead to lost opportunities, as potential clients seek instant, clear and accurate information. Furthermore, traditional methods for document signing, such as postal services, introduce delays, increase costs, and create friction in the client onboarding journey.
- **Limited Visibility and Data-Driven Decision Making:** Without a centralised system, firms often lack clear, real-time insights into case progress, staff workload distribution, performance metrics, and financial health. This absence of comprehensive data hinders strategic planning, resource allocation, and proactive problem-solving.

These interconnected challenges collectively impact a firm's profitability, its ability to attract and retain talent, its market reputation, and ultimately, its capacity for sustainable growth and adaptation.

## The Strategic Imperative: An Integrated Solution

Property Marvel's Legal CM Suite represents a paradigm shift in legal practice management. It provides a unified, intelligent, and highly responsive platform meticulously designed to overcome these pervasive challenges. By integrating robust, feature-rich case management with purpose-built applications, the suite delivers a holistic and interconnected approach to modernising legal operations. As a fully cloud-based solution, the entire suite ensures unparalleled accessibility from any location, enterprise-grade data security, and a significant reduction in on-premises IT infrastructure and maintenance overhead.

## Core Components of the Legal CM Suite:

The Legal CM Suite is comprised of powerful, yet seamlessly integrated, applications:

### 1. Legal CM: The Foundation of Modern Case Management

**Legal CM** serves as the central nervous system of the suite, offering a powerful, process-driven system for managing every aspect of a legal case, from initial inquiry through to completion and archival.

- **Dynamic Workflows and Intuitive Diaries:** At its heart, Legal CM leverages highly configurable, process-driven workflows that can be tailored to your firm's unique methodologies and practice areas. These workflows automate task assignment, ensuring timely progression and adherence to internal protocols and compliance requirements. Integrated diaries provide real-time visibility for individual users, teams, and the entire firm, highlighting future tasks, those due today, and critically, overdue items, thereby drastically reducing the likelihood of missed deadlines or overlooked actions.

- **Proactive and Automated Communication:** Legal CM revolutionises client and third-party communication. Automated case progress digests are dispatched at the end of each day, providing detailed breakdowns of case activity to clients, and summarised updates to introducers, brokers, and estate agents. This proactive communication, combined with a secure Client Portal and dedicated Mobile Apps (for Android and iPhone), significantly reduces the volume of inbound calls and emails requesting status updates, freeing up staff time. Clients can view progress, send messages and documents, complete forms, and even verify identity through integrated solutions like Credas ID.
- **Comprehensive Data Management and Document Generation:** The system includes a fully featured, searchable contacts database with robust audit trails and duplicate prevention. Powerful mail merge capabilities allow for the creation of customised emails, PDF documents, PDF forms (e.g., Land Registry, Law Society forms), and Word documents, leveraging a vast dictionary of pre-defined merge fields and custom fields. The Custom Forms feature is particularly innovative, enabling firms to design intelligent, conditional data-capture forms for staff or clients, with sections that repeat or hide based on previous answers, streamlining complex data collection.
- **Integrated Financial Management:** Legal CM incorporates built-in client accounting functionalities, ensuring meticulous tracking of client monies, supported by evidenced bank reconciliations. For firms billing by time, a timer feature accurately tracks chargeable hours, which can be applied at custom rates and in nominated blocks. Automated completion statements are generated directly from instructed quotes, populating charges and providing a clear financial summary for clients. **Legal CM also contains its own robust Quotation platform and e-signing engine** for direct use within the system.
- **Robust Compliance, Audit, and Integration:** The system ensures a strong audit trail for all actions. Automated barcoding facilitates effortless document re-attachment and provides an audit trail for document origin. Seamless email integration (IMAP / SMTP / Office365 connectivity) allows for direct composition and sending of mail, with automatic attachment to matters. Dropbox integration streamlines the import of scanned documents. Crucially, Legal CM is recognised by HMRC for electronic SDLT submissions, automating form completion and submission. Secure archival storage in Amazon and Microsoft clouds ensures long-term, encrypted storage of completed matters.

## 2. Report On Title (PM-ROT): Precision Conveyancing Reporting

**PM-ROT** is a specialised application that **integrates with Legal CM** and transforms the often arduous process of generating critical conveyancing reports into an efficient, accurate, and compliant workflow.

- **Intelligent, Dynamic Questionnaire:** The core of PM-ROT is its intelligent questionnaire, which dynamically re-configures in real-time based on user selections. This ensures that the generated report's structure is always correct and contains all the necessary legal and factual elements required for specific report types, such as Report On Contract, Report On Title, Report On Searches, Report On Mortgage, and more.

- **Real-time Generation and Unparalleled Customisation:** As questions are answered on a split screen, the report is generated simultaneously on the right, providing immediate visual feedback. Firms have complete control over customisation, able to integrate their own extensive libraries of precedents to supplement Property Marvel's pre-defined content. This flexibility ensures that reports align perfectly with firm-specific language and requirements, minimising post-generation editing.
- **Enhanced Quality, Consistency, and Compliance:** By standardising the report generation process and leveraging a precedent library written and continually maintained by qualified, practicing solicitors, PM-ROT dramatically improves the quality and consistency of all output. This mitigates the significant compliance risks associated with manual "copy-and-paste" methods, where irrelevant or inaccurate content can inadvertently be included.
- **Professional, Seamless Output:** Once finalised, reports can be instantly produced in a finished PDF format, ready for secure transmission to clients or seamless storage within your firm's CMS. The system automatically generates a nested table of contents, ensuring professional presentation and easy navigation for the recipient.
- All reports can be sent for e-signing at no additional cost. The clients can be asked to complete a firm-defined questionnaire as part of this signing process.

### 3. LegallyQuoting: Accelerating Business Development and Client Acquisition

**LegallyQuoting** is a powerful tool designed to optimise a firm's client acquisition and onboarding processes by providing fast, accurate, and transparent quotations. This application is particularly beneficial for **firms who do not wish to change their existing CMS** but still require advanced online quoting capabilities.

- **Dynamic Online Quoting Engine:** Firms can define their specific services, and the questions required to generate detailed, accurate quotations. The LegallyQuoting plugin can then be seamlessly embedded into a firm's website, allowing prospective clients to obtain instant, fully priced quotes for services like Sale, Purchase, Re-mortgage, or Transfer of Equity, without needing to make a phone call.
- **Automated Instruction and Rapid Onboarding:** A key differentiator is the ability for clients to instruct the firm directly from their generated quotation. The system collects all necessary data through customisable instruction forms. Optionally, LegallyQuoting can automatically mail-merge and dispatch a comprehensive client care pack directly to the client upon instruction, significantly accelerating the onboarding process and creating a positive first impression.
- **Proactive Lead Management and Follow-up:** To maximise conversion rates, LegallyQuoting can optionally enforce the collection of contact details (name, email, telephone) at the point of quotation. This enables the firm's new business team to proactively follow up on quotes, nurturing leads and increasing the likelihood of conversion.
- **Enhanced Risk Management and Introducer Support:** Advanced features such as Lender Panel Management and Deposit Country Control allow firms to define specific

criteria and filter out cases that may not align with their risk profile or service offerings. Additionally, the system provides robust tools to set up and manage a network of introducers, facilitating the growth of referral business.

- **Flexible Pricing and Professional Presentation:** LegallyQuoting accommodates various accounting methods, allowing firms to choose whether to apply VAT or itemise charges. Firms can also define their own quotation templates, controlling fonts, colours, letterheads, and footers, and even "stitch" custom PDFs before and after the quote for branded collateral.
- **Full integration into your CMS:** LegallyQuoting comes with a comprehensive API meaning your CMS provider can integrate upon your request.

## 4. SignatureMarvel: Secure and Effortless Document E-Signing

**SignatureMarvel** simplifies and secures the process of obtaining electronic signatures, offering a highly efficient and cost-effective alternative to traditional, paper-based methods. This application is ideal for **firms who do not wish to change their existing CMS** but require a powerful and secure e-signing solution.

- **Intuitive Template and Envelope Management:** Firms can create reusable signing templates, defining introductions, signing instructions, and optional data-capture forms. Documents are easily packed into "envelopes," where specific signers are assigned to specific documents, with granular control over who completes any associated data-capture forms.
- **Flexible Signing Options and Rich Data Capture:** Signers are provided with the flexibility to either draw their signature directly or type their name, with the system automatically generating a drawn representation. Beyond just signatures, each signing template can include an optional data-capture form, allowing firms to collect various data types (e.g., single/multi-line text, dates, numbers, checkboxes, dropdowns) directly within the signing process.
- **Robust Security and Authenticity Verification:** Signed documents are returned as locked-down, tamper-proof PDF files, ensuring their integrity. Critically, each signed document is appended with a comprehensive signing activity log, providing a full audit trail from envelope creation to final signature, capturing all legal burdens of proof. SignatureMarvel also allows for the independent verification of a document's authenticity, confirming it has not been altered or forged since signing.
- **Significant Cost and Time Savings:** By eliminating the need for printing and postage, SignatureMarvel offers substantial cost savings. Its pay-as-you-go model means firms only pay for fully signed envelopes, with no charges for expired, unsigned, cancelled, or rejected envelopes, and no long-term contracts or monthly subscription fees. This ensures reliable delivery and enables real-time tracking of signing status.
- **Seamless Integration:** SignatureMarvel is designed for easy integration, notably with LegallyQuoting, allowing for the automatic e-signing of selected documents within client care packs, further streamlining the onboarding process.

## The Power of Integrated Synergy: A Holistic Approach

The true, transformative power of the Legal CM Suite lies in the seamless, intelligent integration between its core components, with **PM-ROT directly integrating with Legal CM**. Additionally, **LegallyQuoting** and **SignatureMarvel** offer powerful, standalone capabilities that can be used independently by firms with existing CMS solutions or integrated to enhance workflows for those who choose. This interconnected ecosystem eliminates data silos, minimises manual data re-entry, and ensures consistency across all stages of a legal matter.

Consider a typical client journey within Legal CM:

- A prospective client obtains an instant, accurate quote via the **Legal CM** website plugin.
- Upon instruction, **Legal CM** automatically creates a new matter record in Legal CM and dispatches a customised client care pack, with key documents automatically sent for e-signing via Legal CM's internal e-signing engine.
- Throughout the matter, Legal CM's workflows guide fee earners, automate client updates via the Client Portal, and track all communications and documents.
- When critical conveyancing reports are required, **Report On Title (PM-ROT)** leverages matter data from Legal CM to generate accurate, compliant reports in real-time.
- All signed documents are automatically returned to the correct matter in Legal CM, maintaining a complete audit trail.

This end-to-end digital workflow fosters unparalleled efficiency, transparency, and a superior experience for both firm staff and clients.

Consider a typical client journey within the Legal CM suite (for firms who don't want to change their CMS)

- A prospective client obtains an instant, accurate quote via the **LegallyQuoting** website plugin (either from the firm's website, or an introducer's website) or is manually issued a quotation via email by the firm or by an introducer.
- The firm's new-business team follows up on the quote, reassuring the client, and answering questions.
- The client, having seen the quality and clarity of the quotation, and gained confidence by speaking with the new business team, decides to instruct, which they do on-line. They provide all the detailed information requested by the firm, including details of deposit gifters and other crucial information.
- The firm processes the new instruction through **LegallyQuoting**, merging and issuing the client care pack by email to the client(s), including links to e-sign the appropriate documents.
- All signed documents are returned to the client(s) and fee earner for storage in the CMS.



- Upon completion of the case the new business team uses **LegallyQuoting** to request feedback from the client. A Happy client is encouraged to leave public feedback on Trustpilot and Google. A dissatisfied client is encouraged to leave internal feedback with the firm.
- Detailed reporting empowers the firm to see where business is coming from, how much of it is converted to instructions, why instructions fall through, the value of gained and lost business, and who is generating positive and negative feedback.

## Tangible Benefits of Implementing the Legal CM Suite

Adopting the Legal CM Suite, and leveraging the complementary tools like LegallyQuoting and SignatureMarvel, delivers a multitude of quantifiable and qualitative benefits, positioning your firm for sustained success:

- **Dramatic Efficiency Gains:** By automating repetitive tasks, streamlining information flow, and providing intuitive dashboards, the suite significantly reduces manual effort and administrative burden, freeing up legal professionals to focus on high-value legal work.
- **Substantial Cost Reduction:** Firms will experience savings on paper, printing, postage, and traditional IT infrastructure. The optimised workflows and reduced administrative overhead can also lead to more efficient staffing levels.
- **Enhanced Compliance and Unwavering Consistency:** Standardised processes, a robust audit trail, and the use of solicitor-written, regularly updated content ensure consistent output and rigorous adherence to regulatory requirements, significantly mitigating compliance risks.
- **Exceptional Client Experience and Reputation:** Real-time case updates, convenient online quoting, and effortless e-signing provide unparalleled transparency and convenience for clients. This leads to higher client satisfaction, fosters positive online reviews, and strengthens your firm's reputation.
- **Scalability, Flexibility, and Business Continuity:** The cloud-based architecture ensures that the suite can scale seamlessly with your firm's growth. It also provides inherent flexibility for remote work, ensuring business continuity during unforeseen circumstances.
- **Accelerated Business Development and Revenue Growth:** Faster, more accessible quoting processes, coupled with streamlined onboarding and effective lead management, directly translate into increased client conversions and a more robust pipeline of new business.

## Conclusion

The Legal CM Suite by Property Marvel represents a transformative, integrated solution for law firms committed to modernising their operations and securing a competitive advantage. By providing a powerful, intelligent, and user-friendly platform that seamlessly combines comprehensive case management with specialised tools for reporting and offering powerful

standalone quoting (**LegallyQuoting**) and e-signing (**SignatureMarvel**) options for broader accessibility, the suite empowers firms to overcome long-standing operational challenges. It enables them to achieve unprecedented efficiencies, realise significant cost savings, and consistently deliver an exceptional, transparent experience to their clients. Embrace the future of legal practice with the Legal CM Suite and unlock your firm's full potential in a rapidly evolving market.

For a personalised demonstration and to explore how the Legal CM Suite, along with LegallyQuoting and SignatureMarvel, can be tailored to meet the specific needs and objectives of your firm, please contact Property Marvel.

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