

THE CASE CONTINUED

NATASHA RAWLEY, THE FILE QUEEN

Last month I left you with a case study of a client's office move that helped them push the firm into some great GDPR process changes. Today we continue.

One of the key challenges the practice manager faced in this move was around the firm's onsite deed/will room. While the manager tried her best to get this room outsourced using us, the partners were adamant that it would remain onsite.

The room was a GDPR nightmare – wills and deeds were consistently taken without notification, and when (or if) they were returned they were normally placed in an incorrect location. Security was a key issue because the room was never locked, and there was no way of tracking what deeds or wills were housed in it.

The firm's fee earners found the room to be such a nightmare that they started to store deeds and wills in their own office storage areas – another GDPR problem. The practice manager consulted with us prior to the move as she knew this was the perfect opportunity to reset this process.

With the constants of the GDPR and keeping the room onsite in mind, we created a new deed/will room process. The room in the new premises was set up using our mobile ActiveWeb software. Once the shelving had been erected and health and safety checked, the ADDS team went into the new premises and placed shelf location codes on each shelf space, and a computer and barcode scanner were set up within the room.

Each will and deed was removed from the old room and barcoded and registered before being assigned to a relocation crate. Once the relocation crate reached the new premises it was scanned right away, along with each deed and will, into a holding area and then scanned into its location.

Deeds and wills were then assigned to locations by scanning the barcode on the file and the location barcode of the shelf it was to be housed on – meaning a full audit check had been carried out of each will and deed and the firm could keep track of them.

Three PAs were put in charge of the area and shown how to use ActiveWeb mobile to search for wills and deeds, check their status, sign them out to members of the team and assign them back into the locations on return. Full GDPR-accountability win with this new process!

I'd like to end this column by saying a massive thank you to all those LPM readers who popped by our LPM London conference stand in February. It was so great to see you all and I hope you all had a chance on the lucky dip – there were some fab prizes in there.

What an amazing array of speakers! We love the LPM conference, as not only does it mean we get to meet new contacts and current clients, but we also learn an array of information to pass on to our clients. If you couldn't make it to London then do come to Birmingham in April! [LPM](#)



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ABOUT

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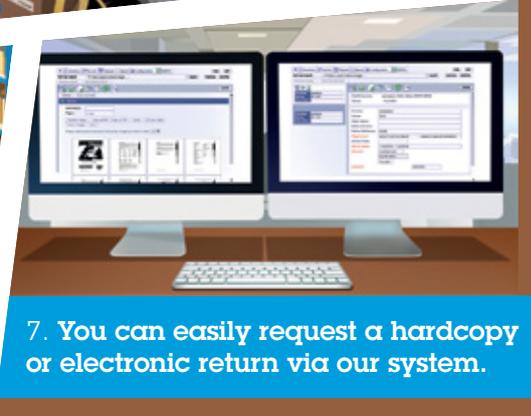


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