Unlocking revenue with Certainty

Hertfordshire law firm, David Barney & Co Solicitors became members of Certainty in November 2010, recognising the significant benefits and opportunities available to their business and clients. In a recent interview, David Barney & Co reported that they had got off to a 'flying start' with Certainty.

Their first step has been to use the Certainty 'TOUCH' system to re-ignite relationships with existing Will clients by offering free Will registration, helping the client to protect their family and assets while simultaneously protecting the future probate work and income streams. The simple, quick process of Will registration eradicates the problem affecting law firms in that they hold Wills without knowing that the testator has died.

Tracy Hatswell, Solicitor, David Barney & Co, comments: “We started to write out to all of our existing Will clients using the free Will registration offer from Certainty. The response was so overwhelming from clients we had to scale back the rate of letters sent in order to accommodate the inbound enquiries. So far, we have been delighted with the response rate from our clients with over 80% of those contacted having now registered their Will with our firm!

Indeed fee income generated from this process in the first three months, from clients wishing to update or review their Will, has more than covered our membership of Certainty. In fact, we have never known such a busy start to the year or been in a position where we can really predict our workload for the coming six months. In a difficult economic market the future of our private client department is really looking good thanks to our Certainty membership. A great deal of revenue remains locked up in our Willbank, using Certainty unlocks it!”

Membership of Certainty continues to grow rapidly with over 600 solicitor’s offices and thousands of practitioners utilising the services. David Barney & Co typifies the type of firm joining Certainty: They have a commercial eye which is focused on a profitable future and an ethos of delivering service excellence. Law firms can protect against potential risk, the loss of clients, new entrant competitors and the loss of probate income using Certainty’s simple, effective and powerful system to strengthen client loyalty and maintain contact. Call Certainty on 0845 408 0404 for further information.

• Tracy Hatswell, Solicitor, David Barney & Co
Certainty Will Search finds Will 34 years after it was written

David Thomas is a Guinness World Record-holder for memory, his memory feats include reciting Pi (3.14159) to 22,500 digits without error and Sunday Times No.1 bestselling author. He has the power to recall many key facts, so remembering simple things such as where a Will may be kept shouldn’t be a problem. But of course, he can only remember facts he has learnt. Like the rest of us, David can’t recall what he doesn’t know.

In 1977 two very important events took place, the Queen celebrated her Silver Jubilee and David's grandfather wrote his Will.

16 years ago David's grandfather died intestate. However David has never given up his quest to find his grandfather's Will.

David comments, "Finding the Will was never about the money. This was all about being able to fill a gap in my knowledge about my Grandad and about who I was and where I came from. With it we could draw a line in the sand. It also helped my brother complete the family tree he’d been working on."

Faced with a problem his memory couldn't help him resolve and keen to bring closure to an emotionally trying experience, David contacted certainty.co.uk. He was sceptical about the chances of finding the Will because his grandfather had died 16 years ago.

But this scepticism swiftly turned into optimism and hope.

The Certainty search team first checked the Certainty national Will register. This initial search quickly found that David's grandfather’s Will was not registered. Certainty then performed a ‘Will Search Cover’ which uses cutting-edge technology to connect solicitors around the country and issues a ‘missing wills notification’. Within a very short time, Certainty unearthed the missing Will.

David continues, “I thought this was so exciting; really magical. Lo and behold this Will had been in the solicitor’s office for 34 years. Then, suddenly there it was - a piece of my history.”

‘This sort of Will search service can be life-changing. It takes something that’s a dry intellectual pursuit and turns it into a human, emotional experience.”

Nigel McGinnity, co-founder of Certainty, added: “Sadly, David’s story is all too common. There are many cases of Wills that haven’t been registered and can’t be found. We know this is a big problem and that’s why Certainty exists.”

A Solicitor’s Guide to Certainty Will Search

Certainty Will Search REGISTER
A 'Register' Will Search, searches the Certainty National Will Register - which currently has circa 1.6m Will records allocated via its members and the public. The register builds daily. The register had a peak day in January where one Will was registered every eight seconds (3633 Wills).

Certainty Will Search REACH
REACH checks for Wills that have not been registered by connecting all firms that undertake Will writing. At the push of a button, the REACH Will search system sends out a ‘missing Will alert’ to solicitors in the areas in which the deceased was most likely to have made their Will ie where they have lived and worked.

Certainty Will Search PROTECT
This search includes the above search processes, Section 27 requirements and the option of a missing Will indemnity to protect the PR from the discovery of missing or subsequent Wills after distribution of the estate.

All Certainty Will search services are quick, thorough and uphold client confidentiality.

Win a copy of the Probate Practitioner’s Handbook

Searching for a Will is no longer time consuming, cumbersome and expensive. Therefore we feel it may be helpful to inform you of the Will search options which are now available to you.


For your chance to win a copy of the Probate Practitioners Handbook 6th Edition, simply answer the following question;

Q. What is the section number in the Probate Practitioners Handbook that covers Missing Wills?

Email answers to info@certainty.co.uk. Entries will be drawn on 31st May 2011. The winner will be notified by email.

See you at the Conference

STEP SPRING SERIES 2011
Certainty will be at this year’s STEP Spring Series conferences in Birmingham on 13th May and London on 27th May.

LEGAL EASEL
Certainty will be sponsoring the Legal Easel conferences in London on 9th March and Gateshead 16th March.

PROBATE WINTER SEMINARS
Certainty are associate sponsor of this year’s Probate Winter Seminars Programme 2010-11. Forthcoming dates are, Bristol on 16th March and Manchester on 22nd March.

We look forward to seeing you.

Essential Reading for Private Client...
In this issue Andrew Holroyd Managing Partner of QualitySolicitors Jackson & Canter talks about why they have joined the Certainty National Will Register. Jackson & Canter was established in 1960 in Liverpool and employ 110 staff. Andrew was awarded an OBE for services to publicly funded Legal Work in Liverpool in June 2003 and a CBE for services to Administration of Justice in December 2008.

Andrew was President of Liverpool Law Society from 1993 to 1994 and Chair of the Standards Board of the Law Society of England & Wales from 2002 to 2005. He was elected Deputy Vice President of the Law Society of England & Wales by the Council in 2005 to 2006, Vice President from 2006 to 2007 and President from 2007 to 2008.

Q. What was your initial reaction to the Certainty National Will Register? When I first heard about Certainty I felt I would wait before committing to see if it gained sufficient penetration in the marketplace. A national database will only work if sufficient customers register wills with it.

Q. Did you fully recognise the longstanding problems which Certainty was set up to address - lost copy Wills, difficulty in searching for Wills and inadequate client contact? For many years clients have been advised to keep their copy will in a prominent place to ensure relatives could locate it after their death. This was the best you could do to make sure that the will you had written for the client had effect. All solicitors are aware of wills in their safe which have either been overlooked or superseded.

Q. What element of Certainty resonated with you most when your interest increased? Not only had Certainty gained good market penetration amongst lawyers but they had developed the product to be much more than just provide certainty that a client’s will would be located.

Q. What objections, if any, did you face internally when making your decision? None when the concept of Certainty had been explained and that the costs could be defrayed by way of higher charges for an extra service rendered to the client.

Q. Did your other partners fully understand the issues first time round? Yes.

Q. Did you appreciate the commercial value for your firm as well as the personal value for your clients? Excellent client service is what my firm has always aimed to deliver. Certainty adds to the quality of the service we provide and added assurance for the client that their Will will be effective.

Q. Did you recognise that Certainty could unlock the value and business within your Willbank? We had already registered our wills on our database but the ability to register all wills made to date by the practice with Certainty gave us the opportunity to write to the client with a free added on service to what we had already done for them.

Q. Did you recognise that Certainty represents a way of safeguarding your probate work income? Certainty provides enhanced ways we can keep in touch with clients and this is good for business and keeping our name at the forefront of clients’ minds.

Q. Did your staff fully understand the value of Certainty for your firm and your clients or did you need to educate them? Our probate team were enthusiastic about the concept from the beginning.

Q. Did the training provided by Certainty help to enthuse your staff (if training has been completed)? Training is always necessary to make the most out of any IT application. We could do with further training about the marketing potential of the marketing module of the Certainty package.

Q. Have you incorporated Will registration into your Will service for all new clients? We have increased our charges and for this increased fee we automatically offer registration of the will with Certainty. Few clients refuse the added value of the registration.

Q. Are you offering Will registration to archived clients in a methodical manageable manner? We have already been through our database and written to all exiting clients offering a free registration.

Q. Do your clients quickly accept Will registration, and the associated benefits, when recommended by you? Yes.

Q. What do feel is the most significant benefit to QualitySolicitors Jackson & Canter through Certainty membership? Showing clients that we take quality of service seriously by going the extra mile for clients.

Q. Do you value the intrinsic risk management provided by Certainty services? We will get to the stage when firms who are not members will be regarded as taking an unacceptable risk by failing to ensure that a will can be located.

Q. Any other comments please. We are pleased to have joined and appreciate the development Certainty has made to the package that they offer.

Intestacy - don’t take the risk
Will Search With Certainty

Certainty Will Search is simple, easy to action, inexpensive and completed in seconds

For further information call Certainty on 0845 408 0404
115 year old seeks new opportunities

Atkinson & Firth is located in Shipley West Yorkshire. The firm can trace its roots back to 1895. This long heritage does not mean that the firm is either old fashioned or stuffy, indeed they are an extremely proactive firm.

Charlotte Montague, Atkinson & Firth comments: “As soon as I heard about Certainty, I thought it was an idea that was long overdue. Many clients, particularly those without immediate or close family, do ask how anyone would know where their Will was kept or who their solicitor was.

I was also aware of how easy it is to lose touch with clients and their families, with increased mobility and the tendency of families to be more scattered than in previous generations. Like many other solicitors, I have also regularly engaged in the often fruitless task of writing to neighbouring firms to try to identify if a Will has been made and if so, where it is kept.

All new clients are now offered Will registration as part of our standard Will-writing service and the majority take it up. We are slowly working through our archived Wills to offer free registrations and this has led to some clients attending to review their existing Wills. Making contact with existing clients has also been a useful way of updating our own database.

I shall be interested to see whether Certainty brings new opportunities in the future through the lost Will search service. This is clearly potentially a long-term benefit which is difficult to quantify at the moment.

With more potential clients using the internet and search engines, I anticipate our membership of Certainty will be useful in generating new business in the future.”

To be or not to be, that is the question

This is not a good economic time to be facing some fundamental structural changes in our profession but the new era of Alternative Business Structures (ABS) arrives on 6 October 2011.

If firms only make short-term decisions without reference to the new market for the provision of legal services then any survival will be short-lived. It is necessary to have a plan which is flexible enough to address current difficulties but in alignment with the longer term project.

What is the point of rushing into a merger or being swallowed up by another firm only to regret that at leisure? I have no doubt that many firms know that ABS are coming but due to the pressure of day-to-day work and, frankly, inertia there has been little or no action to motivate the partners to focus on the fundamental issues.

What is an ABS?

An ABS is any body which provides reserved legal services to “the public or a section of the public” and which has a “non-authorised person” (i.e. a non-lawyer) as a manager (partner, director or member of an LLP) or with an interest in the body such as holding shares or exercising control of voting rights in the entity.

How does it affect my firm?

It is easy to say ABS will not affect me but how will the ‘Traditional High Street Law Practice’ find the budget to invest in new technology and suitable staff willing to work in the business and invest in the future of their type of business when the offering from the squeaky new ABS opens its doors? What if the partners would like to retire but cannot attract people to take over the business and buy them out?

Owners of law firms need to change the way they think about the supply of legal services; the markets which are open to them; the skills needed to supply clients in those markets with products and services which they want at a price they are willing to pay and the firm can afford to offer whilst maintaining or even improving the bottom line, if they are ever to retire!

What to do

Any successful change requires careful and inspired thinking; current pragmatic decisions must not make it impossible to achieve your longer term goals.

Be prepared to have an open mind, look at other industries and the type of services which you admire in those industries and see if they can inspire you to be creative and innovative.

Dare to be different in your analysis of what clients want and how they want the service to be delivered and think out of the box about what you can do to find these clients and address their wishes.

Call me

A facilitator can often open up the discussion within your firm and shine a light onto these and other issues. Contact me - I would be delighted to help you survive and thrive!

Gill Steel - telephone 01962 776442 or e-mail Gill.Steel@lawskills.co.uk See the website at www.lawskills.co.uk

Be Certain - Join Certainty If you would like to discuss the Certainty National Will Register and its associated benefits and join this successful network of law firms, please call 0845 408 0404 or email info@certainty.co.uk

Call: 0845 408 0404
Email info@certainty.co.uk
The Chapel, Chapel Lane, Lapworth, Warwickshire, B94 6EU

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