



## NELSONS

Business Law | Personal Law | Investment

**As one of the leading law firms in the East Midlands, Nelsons has built a strong reputation for providing expert legal and investment support to businesses, individuals and families.**

With offices in Derby, Leicester and Nottingham, Nelsons has achieved consistent growth since it was founded in 1983, both organically and through strategic mergers and acquisitions. The firm is recognised by the independently researched publications The Legal 500 and Chambers and Partners, and features in The Lawyer's Annual Report of the UK's largest 200 law firms.

Nelsons' approach to business is underpinned by its core values – excel, achieve, innovate, together – all of which shape daily business operations and how the firm delivers its services to empower clients. Its specialist experience and depth of resources enables Nelsons to offer services to other solicitors through Fusion Legal, a mutually beneficial referral and support network for law firms.

As an innovative and forward-thinking organisation, Nelsons has always challenged the traditional idea of how a law firm operates. Recent achievements include:

- Achieving a record turnover of £20m in 2022, following an ambitious three year vision to grow the company and focus on creating a high performance culture
- Joining the Lawfront group in 2023, a rapidly growing legal services group at the forefront of the consolidating the legal market in the UK, with the aim of becoming a Top 100 law firm
- Introducing centralised support services and IT systems designed to empower lawyers to work more

*“The team at Nelsons were clear in their need for a seamless migration to their new platform from day one. This clarity enabled us to quickly identify the right approach for the customer. Our extensive experience in delivering SharePoint migrations offers the peace of mind to customers that we know the best way to help them move to the cloud. We are very much looking forward to working with Nelsons as they embrace the benefits of their Microsoft 365 solution.”*

**Roger Peacock**  
Business Development Manager, Circyl

efficiently, moving away from a traditional lawyer-secretary setup and delivering better value for their clients

- Moving to a fully hybrid working environment with all staff, regardless of role, having dedicated laptops and VPN access to the firm's systems.

### Pain points

As Nelsons has grown and expanded, it was keen to continue its focus on innovation and driving the use of technology to best support business operations.

This review led to the firm adopting a 'cloud first' approach to enhance the efficiency of internal processes and information management throughout the organisation, without a dependency on maintaining and updating systems in-house. They selected Microsoft 365 as the best platform to take the organisation forward.

The firm was keen to maximise the benefits of Microsoft 365, including migrating from an 'on-premise' Sharepoint platform to a new SharePoint platform to take advantage of the flexibility offered by the cloud, including enhanced content authoring and approval, prioritised feeds and targeted role-based articles, blogs and content to promote internal communications and colleague engagement.

## Objectives and approach

The key objective for the project was to ensure Nelsons' new intranet provided an accessible and engaging platform for information management and internal communications, and retained historical security access whilst leveraging the enhanced functionality offered by SharePoint online. Therefore, a number of key project objectives were agreed:

- Deliver a more sophisticated platform to enhance user engagement. This would be achieved through:
  - Richer user experience and more visual content
  - Ability for users to comment and feedback on articles, news and content
  - Improved visibility of social and charity news with the option for users to promote their own activities
  - An interactive events calendar, targeted to user groups/locations
- Offer a fast and accurate search and retrieval solution that users trust
- Allow authorised users to automate workflows and streamline processes.

As Nelsons were keen to continue their innovative approach to information management, it was agreed that the solution should adopt best practice methodologies. Therefore, the solution design was based on each department or business function having a separate site collection, allowing the firm to manage governance and growth with ease.

These specific deliverables complimented the core benefits of the SharePoint online platform, whilst facilitating integration with other Microsoft 365 tools such as Teams, Power Apps and Power BI. It allows users to work securely and seamlessly on mobile and tablet devices from any location.

## Outcomes and principles

Circyl leveraged its tried and trusted Agile methodology to deliver the process and control required to deploy the new information hub, with minimal impact on users. The new intranet was based around a 'Home Site' hub with App Bar navigation, enabling users to find important content and resources no matter where they were located. The App Bar offers an improved way of finding and creating experiences, whilst dynamically displaying personalised sites, news, files and lists. All information also has retention policies applied to ensure compliance with both legal and GDPR requirements.

The new intranet adheres to all corporate branding

standards, with images and site navigation tuned to maintain a level of familiarity so that all staff would not need extra knowledge transfer or training.

The SharePoint platform includes elements of process automation, facilitating the triggering of standard workflows by authorised users, to improve efficiency and accuracy. Over time, the ability to automate repetitive tasks will improve employee satisfaction, as these can be performed in the background, so that users can actively work on more engaging tasks and actions.

To ensure the agreed content was migrated quickly and efficiently with the appropriate Metadata tags, the free SharePoint Migration Tool (SPMT) was used to move content into Microsoft 365. To ensure Nelsons would be self-sufficient, Circyl delivered comprehensive administration training to key staff, which in turn would allow them to help wider teams in creating their own content.

The customer now has the peace of mind associated with a cloud-based solution. They no longer have to manage and maintain server farms, whilst data backups are all performed automatically as part of the SharePoint online service. This allows the IT team to engage with the business on continued innovation, supporting growth and service improvement.

*"We are really pleased with our new SharePoint platform. The team at Circyl had a clear plan that minimised impact on our business operations and resulted in an engaging, accessible new intranet which delivers all the key objectives and resulted in an enhanced resource for communication and colleague engagement. We plan to partner with Circyl on more projects moving forward as we embrace the enhanced functionality that cloud services offer the firm."*

### Matthew Riches

Director of Digital Innovation & Technology,  
Nelsons

## Technologies utilised

During the project, Circyl leveraged the following technologies:



**Microsoft SharePoint:** SharePoint is a web-based collaborative platform that integrates with Microsoft Office, enabling organisations to manage and store documents efficiently. It is highly configurable, and solutions can be tailored to meet the unique needs of any organisation.