

The power of joining the dots

Louise Edwardes, Head of Product at InfoTrack, suggests some conveyancing timesavers

IN BRIEF

- Gives guidance on joining up the conveyancing procedure, using solutions that manage entire sections of the process.
- Explains how to use technology to achieve those aims and make the process faster.

Conveyancing has been a notoriously fragmented process—sourcing information from multiple suppliers, communicating with numerous stakeholders, and dealing with myriad systems and platforms. It's time consuming, inconvenient and can leave conveyancers open to risk.

It's why connecting the dots can relieve much of the high-risk administrative burden, providing a better experience for conveyancers and their clients. While the 'why' is often easy to answer, the 'how' can seem more elusive. From understanding why single point solutions are no longer the best option, to how integration and data integrity are minimising risk and saving time, knowing how and where you can bring it all together in conveyancing is changing the game for firms.

So, what do you need to know about joining up your conveyancing process?

Single point solutions are limiting your productivity

Single point solutions offer a tool to target one specific part of a process such as completing a digital ID check or submitting an AP1. They are focused on one key task rather than enabling users to manage processes from end-to-end.

If you're using multiple systems and tools to complete various conveyancing tasks, it increases the administrative burden and slows down the process. It also increases the risk of misplaced documents that could cause delays to a transaction.

Point solutions are good at solving one specific problem. And in the early days

when the digitisation of conveyancing was about introducing technology to manage one aspect of the process, it was suitable. But as the industry is looking to digitise the entire conveyancing process, point solutions for one task no longer improve the process, they hamper it.

If you're logging into multiple systems, saving files and uploading them into your matter, only to potentially also send them somewhere else as an attachment, it's no longer efficient and it's limiting your productivity.

Instead, it's time firms considered solutions that focus on managing entire sections of the conveyancing process, or even better, digitising the process with an end-to-end solution. But how can you achieve this?

Align your tech with your process

There are three core sections to the conveyancing process: onboarding, pre-completion, and post-completion. Reviewing how you use technology to manage these sections of the process in the same way as you operate them can significantly increase productivity and streamline the conveyancing workflow.

Instead of using one provider to complete digital ID checks and another for source of funds and wealth verification or AML checks, manage the entire onboarding process with one solution. Doing this provides benefits for both you and your clients.

Having everything to onboard your clients in one place gives you better visibility over a client's progress, and gives them one place to complete everything required to get the transaction started. It improves data integrity. You'll save time not switching between providers and downloading and uploading results and, typically, clients return the information faster when it's all managed within one system.

The same principle applies to how you

manage your pre- and post-completion. If you manage your contract packs, searches, and title reports in one place rather than with different providers or tools for every task, you will save time and reduce the risk of errors. You can reduce time spent on unnecessary admin, reduce rekeying data, and can even automate parts of the process, freeing you up to spend more time looking after your clients.

What are the benefits of managing your conveyancing tasks this way?

Maintaining data integrity

Data integrity ensures traceability and accuracy, making it a crucial part of a reliable transaction. In a joined-up digital conveyancing process, it also ensures consistency. If you obtain information when onboarding your client, that information can populate and inform several tasks throughout the conveyancing process.

This is then compounded as more information is returned from searches, especially if you have integrated your conveyancing providers with your case management system. Every time you save files, upload them to another system or send them via email you create a new possibility of information being lost, misplaced, or attached to the wrong matter.

If data is pre-populated throughout a transaction, the reduced need to rekey information means fewer chances of errors entering the matter. Maintaining data integrity provides you with a single source of truth, making your processes more consistent and minimising the risk of errors.

Making end-to-end digital conveyancing possible

End-to-end digital conveyancing solutions are designed to streamline the entire process from start to finish. It connects the data used throughout a transaction from client onboarding right through to post-completion.

The outcome is a conveyancing workflow that relieves firms of administrative burden, improves data integrity, and helps with compliance management. Solutions that make end-to-end digital conveyancing possible are already here, and firms are on board.

In a profession that is increasingly becoming inundated with regulatory updates, increased fraud risks, and evolving client expectations, using a solution that connects the dots and makes managing the conveyancing process easier is hugely beneficial.

Louise Edwardes is Head of Product at InfoTrack, a legal technology provider that is driving innovation in digitising the home moving process (Infotrack.co.uk).
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