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CASE STUDY

# Foot Anstey embraces a new way of working with Peppermint's CMM

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What started off as a project to replace a decade-old case management system turned into a long-term partnership between Foot Anstey and Peppermint. The firm's head of software and data engineering Paul Harvey outlines how the firm worked together with the vendor to implement its case and matter management system — and how this led to a fundamental change in the firm's engineering team structure, processes and efficiency for the better.

A case management system (CMS) can make or break a law firm's operations. Recognising that its legacy system was no longer the best solution to meet its needs, Foot Anstey decided in 2019 that it was time for a change.

"We had used our legacy CMS for over five years, but throughout this time, it hadn't been improved much. It was quite clunky and complex, and we reached a point when we weren't able to do much with it," recalls Paul Harvey, the firm's head of software and data engineering.

After a thorough review of its processes as part of a firm-wide growth strategy, Foot Anstey began looking for the perfect system: one that would offer high-quality capabilities and allow customisation, and which would fit with the firm's existing Microsoft-heavy tech stack to streamline operations.



It was exactly these qualities that drew Foot Anstey to Peppermint Technology's case and matter management system (CMM). "We realised that we could use certain capabilities straight out of the box — which would significantly speed up the implementation process — but also have the ability to customise certain modules to best fit our processes. It was this combination of speed and customisation, as well as Peppermint's close partnership with Microsoft, that attracted us to the CMM."



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### A Focused Approach

At the time, Foot Anstey was already working with Peppermint on integrating the vendor's client relationship management platform — yet another reason why implementing the tech company's CMM was a great fit for the firm. "Aside from improving our client relationship tech stack, the client relationship management platform launch was also a great way to get team used to the new Peppermint and Microsoft Dynamics environment," Harvey explains.

Changing a CMS that hundreds of people had been using for several years is no easy feat — and is certainly one that requires a certain level of finesse to win people's hearts. After careful considerations and a few trials, Foot Anstey decided the best approach was to implement the new CMM one department at a time — starting with the teams that relied the least on the legacy system, and then moving on to the departments that could benefit the most from the new CMM.

"This worked amazingly well," notes Harvey. "It allowed us to fully focus our attention and efforts on each individual team, making sure that we were properly training and onboarding the team members before moving to the next one. And with each small implementation, we learned new lessons on how to better deliver this — after the first few rounds, the process became so much slicker and faster, it was pretty much second nature to us."

Since 2020, when the firm began the process of replacing its CRM, 17 out of Foot Anstey's 24 departments were successfully migrated to Peppermint's CMM — with the firm currently working on onboarding the remaining seven.

"These legal teams have quite complex workflows which require bespoke customisations, so we're in the process of developing this and onboarding them, while also carrying out continuous system improvements at the same time," he explains.

### Shaking things up to the core

Harvey notes that the CMM system implementation was a major operation for Foot Anstey — and a much bigger project than the firm initially anticipated. Aside from the technical aspects, this required structural changes within the firm — including an expansion of its relevant software engineering team, and an extensive data cleaning and migration exercise.

"At the time, we had one solution architect that looked at our tech ecosystem as a whole, and four engineers that were trained on the legacy system. So we had to retrain our existing team and bring in more people, such as testers and new engineers, to be able to effectively implement and manage the new CMM system, and deliver the necessary customisations for the users," Harvey elaborates.

Compounding the complexity of this project was the Covid-19 pandemic, which had emerged right as the firm began implementing the system. Despite these challenges, Harvey confirms Peppermint has been extremely pragmatic and supportive every step of the way.

From the outset, the tech supplier provided demos, training and documentation to ensure every Foot Anstey user thoroughly understood how to use the platform.



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“To properly implement a new system, it is essential to have honest and productive conversations with the tech vendor to ensure it understands and delivers on your particular requirements. Peppermint was always open to this, and overall, working with them has been a positive experience.”

With 17 legal teams now using Peppermint’s CMM system, Harvey confirms the team’s feedback has been positive. Users say the workflow engine is much more intuitive and easier to run, and allows them to automate several tasks and integrate other existing applications the firm is using — resulting in a faster and smoother process overall.

Aside from rolling out the CMM across its remaining seven legal departments, Foot Anstey is focusing on continuously improving and evolving the system. This is all part of the firm’s IT goal — To provide secure, reliable & innovative technology solutions that empower our firm’s strategy, foster trust and deliver exceptional outcomes for our colleagues and clients.

“We’ve got a product development roadmap that includes automating additional tasks, integrating new functionalities and bringing to live some of the data using Power BI, that will play a key part in our journey to create a centralised and frictionless tech ecosystem. The new CMM system is certainly part of that, so we will continue to work closely with the Peppermint team to achieve this overarching goal.”

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