



Unifying legal services through shared service transformation

North Yorkshire Council's transition from seven legal systems to one.

North Yorkshire's move from seven councils to one unitary authority required a unified legal case management system—streamlining data, boosting collaboration, and enabling more productive, secure legal service delivery.

employees
78

users since
2007

sector
Local
Government



From seven legal systems to one:
ensuring compliance and collaboration



**Unified case
management system**



Seamless Transition to a Unified Case Management System

North Yorkshire's move to a unitary authority meant merging seven different legal case management systems into a single, secure system. By consolidating case data, council legal teams could access all historical and active cases in one place, eliminating issues caused by fragmented information.



Improved Collaboration Across Departments

Previously, legal teams across multiple councils worked in silos, creating challenges in case coordination and communication. A unified system allowed for real-time document sharing, workflow automation, and cross-team collaboration, ensuring consistency and accuracy in case handling.



Strengthened Compliance and Risk Management

A key concern during the transition was ensuring compliance with regulatory frameworks. The move to a structured, centralised case management system provided enhanced audit trails, access controls, and data integrity, reducing the risk of information loss and legal non-compliance.



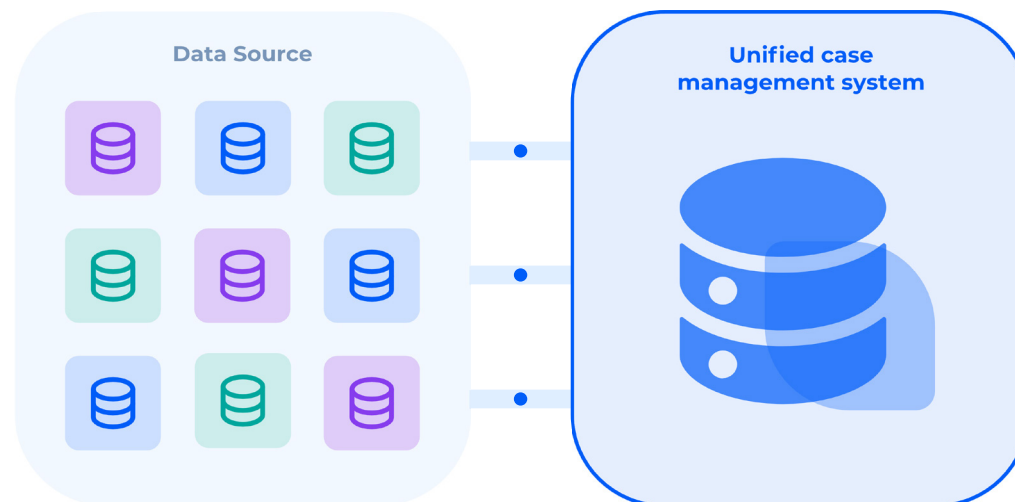
Enhanced Delivery Through Digital Transformation

By adopting modern digital tools, North Yorkshire Council improved its legal service productivity. The new system provided dashboard reporting, automated workflows, and seamless integration with council-wide administrative functions, enabling legal teams to focus on strategic casework rather than administrative burdens.

The Challenge of Legal Data Fragmentation

Before the transition, each of the seven councils had its own case management system, leading to data silos and inefficiencies. Legal professionals often struggled to retrieve historical case records, which impacted decision-making and case continuity. Some councils relied on paper-based processes, while others had outdated digital systems, creating inconsistencies in record-keeping and making it difficult to ensure data integrity across all locations.

The migration process required significant data cleansing and restructuring, ensuring that historical case files were properly formatted and categorised before being moved into the new system. This meticulous approach minimised data loss and duplication, allowing for a smoother transition to the unitary model.



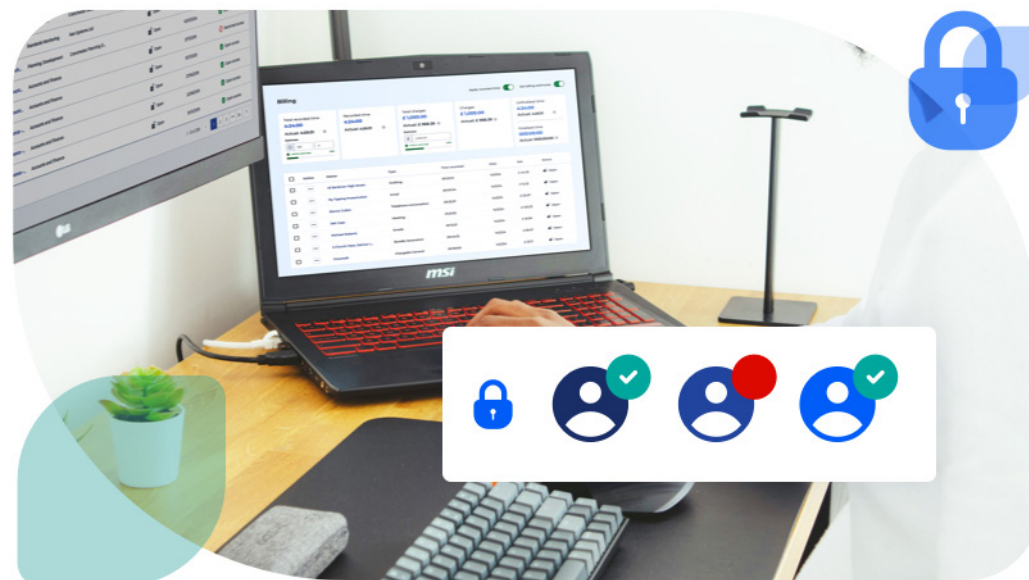
MERGING CASE DATA FROM MULTIPLE AUTHORITIES WAS A SIGNIFICANT CHALLENGE, BUT BY MOVING TO A CENTRALISED SYSTEM, WE ENSURED ALL LEGAL PROFESSIONALS HAD ACCESS TO THE SAME, UP-TO-DATE INFORMATION.”

— PHILLIP BUCKLEY, NORTH YORKSHIRE LEGAL LEAD

Navigating Compliance and Security Risks

During the transition, data security and compliance were top priorities. Legal teams needed a secure system that adhered to GDPR and public sector regulatory requirements. The council had to ensure that all sensitive case files, court documentation, and client records were properly transferred and stored in line with compliance standards.

Another challenge was maintaining strict access controls across different departments. With a single legal case management system, different teams required role-based access levels to prevent unauthorised modifications or data breaches. Implementing audit trails and version control within the system ensured that any changes to documents were tracked and recoverable, providing greater accountability and transparency.



“ENSURING COMPLIANCE ACROSS A NEWLY FORMED UNITARY AUTHORITY WAS PARAMOUNT. THE STRUCTURED APPROACH TO DATA MIGRATION ALLOWED US TO MAINTAIN HIGH STANDARDS OF SECURITY AND GOVERNANCE.”

— PHILLIP BUCKLEY, NORTH YORKSHIRE LEGAL LEAD

Collaboration as the Key to Success

The shift to a unitary authority required extensive collaboration between legal, IT, and administrative teams. The success of the transition was rooted in early stakeholder engagement, ensuring adoption and buy-in from legal professionals. Regular training workshops and cross-team planning sessions played a crucial role in ensuring a smooth adoption process.

Additionally, having a dedicated project team overseeing the transition helped mitigate resistance to change. Legal professionals needed to feel confident in using the new system, and structured onboarding programmes helped them understand how to navigate the software effectively. The transition also involved external stakeholders, such as barristers, law firms, and court representatives, ensuring that interoperability between systems was maintained and external case-sharing remained seamless.



“**BRINGING MULTIPLE TEAMS TOGETHER UNDER ONE SYSTEM WAS NOT JUST ABOUT TECHNOLOGY; IT WAS ABOUT PEOPLE. TRAINING, ENGAGEMENT, AND CLEAR COMMUNICATION PLAYED A HUGE ROLE IN MAKING THIS WORK.”**

— PHILLIP BUCKLEY, NORTH YORKSHIRE LEGAL LEAD

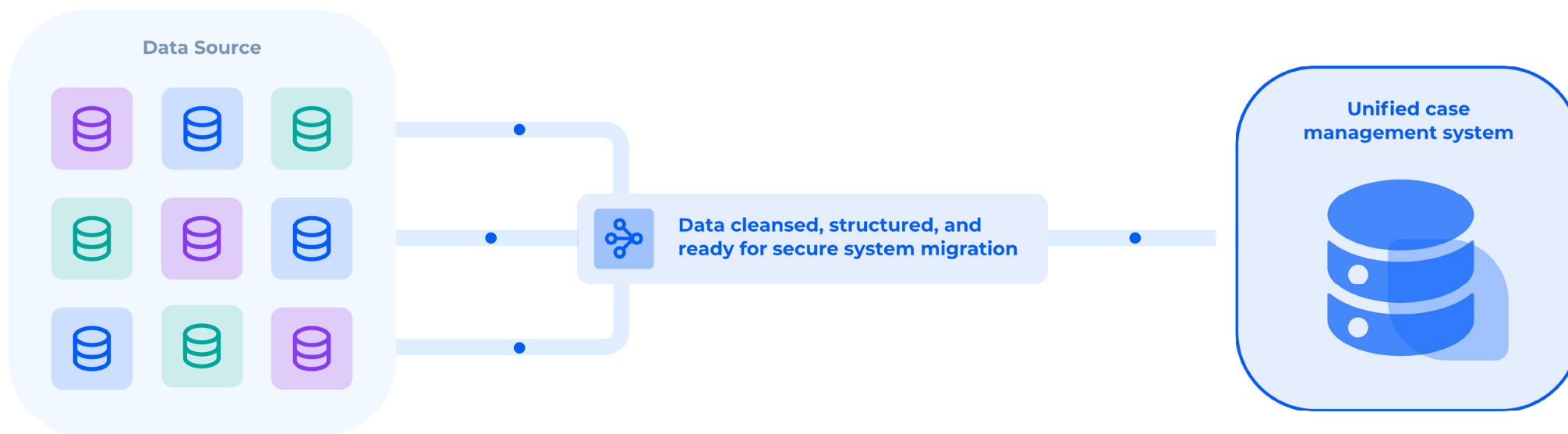
In conclusion, North Yorkshire's transition to a unitary authority exemplifies how shared service projects can drive productivity and innovation in local government.

By consolidating legal data into a single, structured case management system, the council has improved service delivery, compliance, and collaboration. This case study offers key insights for other local authorities considering a shared service model, demonstrating the importance of technology, strategic planning, and stakeholder engagement in achieving a successful transformation.



**THE TRANSITION TO A UNIFIED
LEGAL CASE MANAGEMENT SYSTEM
HAS BEEN TRANSFORMATIONAL
FOR NORTH YORKSHIRE. WE
NOW OPERATE WITH GREATER
PRODUCTIVITY, COMPLIANCE, AND
CONFIDENCE.”**

— PHILLIP BUCKLEY, NORTH YORKSHIRE LEGAL LEAD



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Action	Reference	Name	Type	Status	Opened
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...	foi-inf-010	FOI - Cranchester Council HR Department - Cha...	FOI: Information Request	Closed	13/07/2021
...	sch-adb-003	Cranchester Juniors - Grant Melton	Schools: Admissions Bo...	Closed	06/07/2021
...	hus-dis-006	3 The Grange, Cranchester, CC5 4SP	Housing: Disrepairs	Open	22/06/2021
...	sch-adb-002	Cranchester Infants - Mikail Navarro	Schools: Admissions Bo...	Open	21/06/2021
...	hus-dis-005	Crossways, Cranchester, CC14 8HY	Housing: Disrepairs	Open	18/06/2021
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...	con-rtb-010	16 Leivers Road, Cranchester, CC14 9JD	Conveyancing: Right to ...	Open	25/05/2021
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...	sch-adb-001	Cranchester Grammar - Freja Hubbard	Schools: Admissions Bo...	Open	17/05/2021

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