



# Case Study

## CLIENT

**Enhancing company secretarial services through innovative solutions: a case study of Stevens & Bolton**

The Stevens & Bolton logo, consisting of the letters 'S&B' in a bold, serif font, enclosed within a white circle.

**S&B**

Stevens & Bolton is an independent UK law firm with around 150 lawyers, approximately a third of them partners, many of whom chose to join the firm from City law firms. They are people who listen. People who develop a real understanding of your needs, concerns and priorities. People who care deeply about the outcome.





Stevens & Bolton works across the UK and internationally with handpicked partner firms for an extensive client base ranging from major international organisations, UK FTSE companies, owner-managed businesses, entrepreneurs and individuals. Stevens & Bolton's commitment to quality and continuous improvement underpins everything the firm does. The firm recognized the need to enhance its company secretarial services to meet growing client demand while ensuring compliance with regulatory standards.



#### Challenges faced:

Stevens & Bolton's company secretarial team previously served a limited number of clients and growth was restricted by constraints in managing day-to-day company secretarial tasks (such as register updates and Companies House filings) and supporting more complex requirements from corporate transactions.

Demand for its company secretarial services was growing and Stevens & Bolton wanted to expand this offering. The firm needed to accommodate an increasing workload efficiently: addressing existing requirements and scale with an expanding client base.

#### Objectives:

**Client base growth:** Expand the company secretarial client base significantly both in terms of numbers and complexity of requirements.

**Efficiency in transactional processes:** Stevens & Bolton recognised the need to enhance efficiency in its transactional processes to make the most of existing resources and improve productivity.

**Procedural compliance:** Keeping abreast of regulatory changes and remaining compliant with Companies House requirements was a priority for Stevens & Bolton. The firm wanted to establish more procedural and systematic approaches to ensure ongoing compliance. By implementing Kudocs, Stevens & Bolton would leverage its features and capabilities to stay up to date with changes and streamline processes effectively.



#### Solution:

Stevens & Bolton recognised that Kudocs, being developed by ex-lawyers, understood the legal intricacies involved in a company secretarial service. This was critical to a law firm providing such services to its clients.



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A key factor that set Kudocs apart was its high level of compliance compared to other products in the market. Stevens & Bolton found Kudocs' daily updates and filing reminders invaluable, especially for supporting junior team members and managing client communications efficiently.

Stevens & Bolton was particularly impressed by Kudocs' PSC/RLE functionality, which demonstrated the platform's intelligence and automation capabilities. The platform's ability to automate filing processes and minimise the risk of errors was crucial, as double-handling filings leads to inaccuracies with potentially serious consequences, including court orders and time-consuming corrections.

Kudocs enabled Stevens & Bolton to streamline the team's workflow and ensure compliance with regulatory requirements, enhancing efficiency and service quality.

### Results and outcomes:

**Client base growth:** Stevens & Bolton's company secretarial practice expanded significantly, achieving a fivefold increase within a few years.

**Transactional support:** Kudocs has proven invaluable in supporting the firm in completing corporate transactions efficiently and correctly, reinforcing its reputation as a trusted legal partner capable of delivering seamless solutions.

**Enhanced operational efficiency:** Kudocs streamlined day-to-day operations, facilitating easy onboarding of new team members and improving productivity and client service delivery.

### Conclusion:

Stevens & Bolton's experience exemplifies the transformative impact of innovative tech solutions in the legal industry. By using Kudocs to enhance its company secretarial services, the firm achieved remarkable results, including substantial client growth. This success underscores the importance of technology in driving innovation and delivering exceptional client service in the success of high-quality firms in the legal sector.



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