



Keoghs completes its transition to Elite 3E with role-based support

"Harbor quickly understood our audiences and built a training approach that worked across both finance teams and file handlers. The trainer scripts, quick reference guides and eLearning gave people confidence, and the team's support through UAT and remote go-live was invaluable in keeping the change on track. I would highly recommend using Harbor for similar projects."

Billie-Jean Whitaker, Business Transformation Director, Keoghs

Keoghs LLP needed to move from Elite Enterprise to Elite 3E by the end of December 2025. The transition affected people across the firm and required a practical, role-based approach that could support finance teams and file handlers across different locations.

Keoghs engaged Harbor to deliver Elite 3E training and change support, helping people understand how to use the system in line with the firm's processes and preparing the business for a successful go-live.

Aligning training to different roles

The program was designed around the different responsibilities, levels of experience, and locations of Keoghs' users.

Finance training was delivered onsite for management accountants, credit control, cashiers, accounts payable, and billing teams. File-handler training was delivered remotely, supported by awareness sessions and quick reference guides focused on key tasks.

Harbor also created bespoke trainer scripts and supported user acceptance testing. Questions and key messages raised during testing were documented and fed back into the change approach, helping the project team prioritize actions and respond consistently.

Equipping teams for the transition

To reinforce learning, Harbor produced quick reference guides for finance teams and two eLearning modules for file handlers:

3E Navigation & Basics

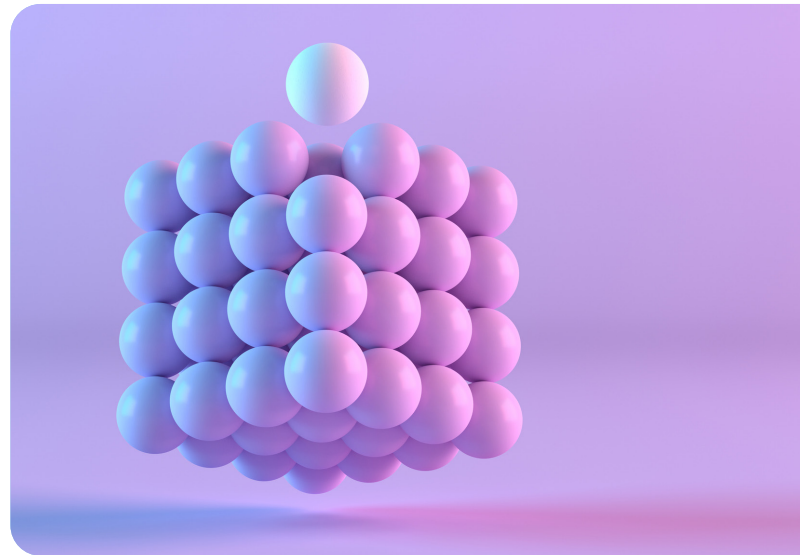
In-depth Proforma/Billing training

Remote go-live support was provided for both finance teams and file handlers, giving users a reliable route to assistance during the transition and early operational cycles.

Completing the move to Elite 3E

Keoghs transitioned from Elite Enterprise to Elite 3E by the end of December 2025. People across the firm were better prepared for go-live and had access to clear guidance and responsive support when they needed it most.

The combination of onsite finance training, remote file-handler training, tailored learning assets, structured UAT support, and hands-on remote go-live assistance helped establish consistent ways of working and strong foundations for the ongoing use of Elite 3E.



"Harbor's **expertise and proactive** support proved **invaluable** throughout our transition. Their approach ensured everyone felt **confident** and **well-supported** during each stage of the process."

Billie-Jean Whitaker, Business Transformation Director, Keoghs



Harbor is a globally integrated team of strategists, technologists and specialists focused on helping law firms, corporations, and their law departments achieve breakthrough outcomes. We are also helping to steer a legal industry in the midst of turbulent change. We navigate alongside our clients and partners, providing salient insights, scalable resources, and seasoned advice.

This engagement was initiated by iTrain, which is now part of Harbor.



Keoghs is a leading provider of legal and claims solutions to insurers, businesses, government departments, and other organizations across the insurance sector. Its 1,800-plus employees manage more than £1 billion in insurer claims and resolve more than 100,000 claims each year.