# Importance of the "Right Technology" at the right time - for the Right Reason.

Thereza Snyman, Kevin Goosman & David Baskerville

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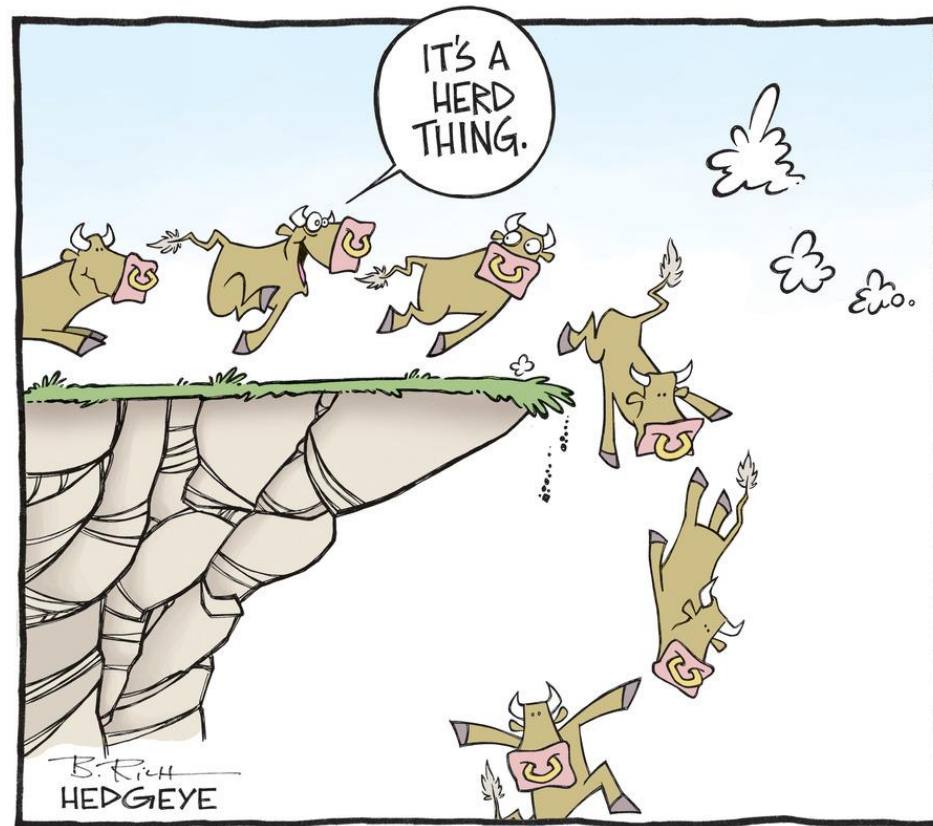www.BaskervilleDrummond.com

# Its YOUR Journey

Thereza Snyman

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# Don't Follow the Herd

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# Back to Basics

**Strategy**

- What is the strategy for your practice?
- What are your business goals?

**Analyse & Devise**

- Does your tech support your business goals?
- Gap analysis
- IT strategy
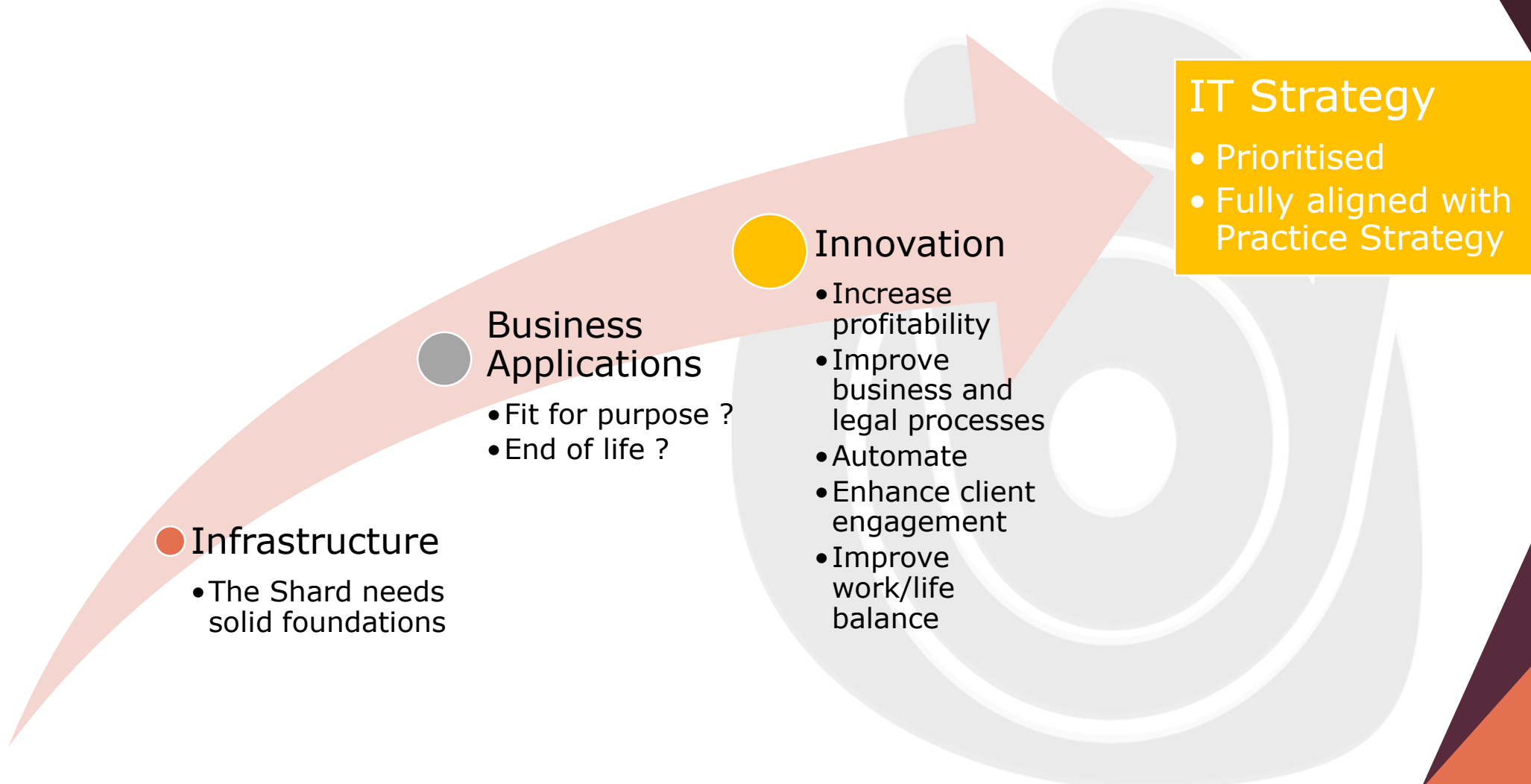
**Deliver**

- Prioritise
- Implement

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# Where are you on your journey?

## IT Strategy

- Prioritised
- Fully aligned with Practice Strategy

## Innovation

- Increase profitability
- Improve business and legal processes
- Automate
- Enhance client engagement
- Improve work/life balance

## Business Applications

- Fit for purpose ?
- End of life ?
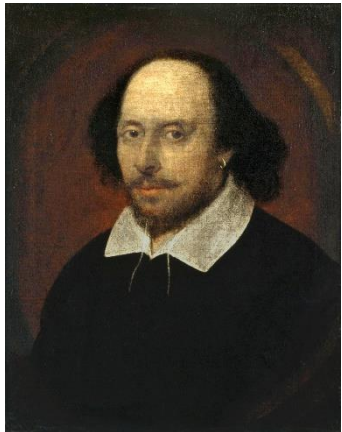
## Infrastructure

- The Shard needs solid foundations

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# The journey…

"Every journey of a thousand miles starts with a single step…"
Laozi (circa 570 BC)

"To Cloud or not to Cloud…"
(apologies to William Shakespeare)"

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# Laying the foundation

## Capacity

- Can your current infrastructure support your (current and/or new) applications, your users, your projected growth, your expansion plans, any new offices?

## Location

- If your current infrastructure is on site, should you move to the "cloud"? If so, which "cloud"?
- If it makes sense to retain an on-site infrastructure, what are the implications? Should you renew – all or some?

## Staffing

- Can your current IT team continue to support such a strategy?

## Networking

- Should you renew your network or inter office network connections ?
- Is your infrastructure/ network **SECURE**? Does it allow for secure mobile working?

## Continuity

- Are your backup/ business continuity/ disaster recovery measures fit for purpose?

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# ...and the next step...

## PC's & Laptops

- Should you renew your desktop/ laptop fleet? Or should you move to more laptops/mobile devices to allow for more effective mobile working?

## Telephony

- Should you renew/ upgrade or change your telephony?

## Resourcing

- If the answer(s) to any of the above is "yes", do you have the right in-house resources (strategic and operational) to implement such projects within a realistic time-scale, whilst still dealing with BAU?
- Do you need external advice to help you formulate the strategy or help you with the implementation?

**AND HOW MUCH IS IT ALL GOING TO COST?**

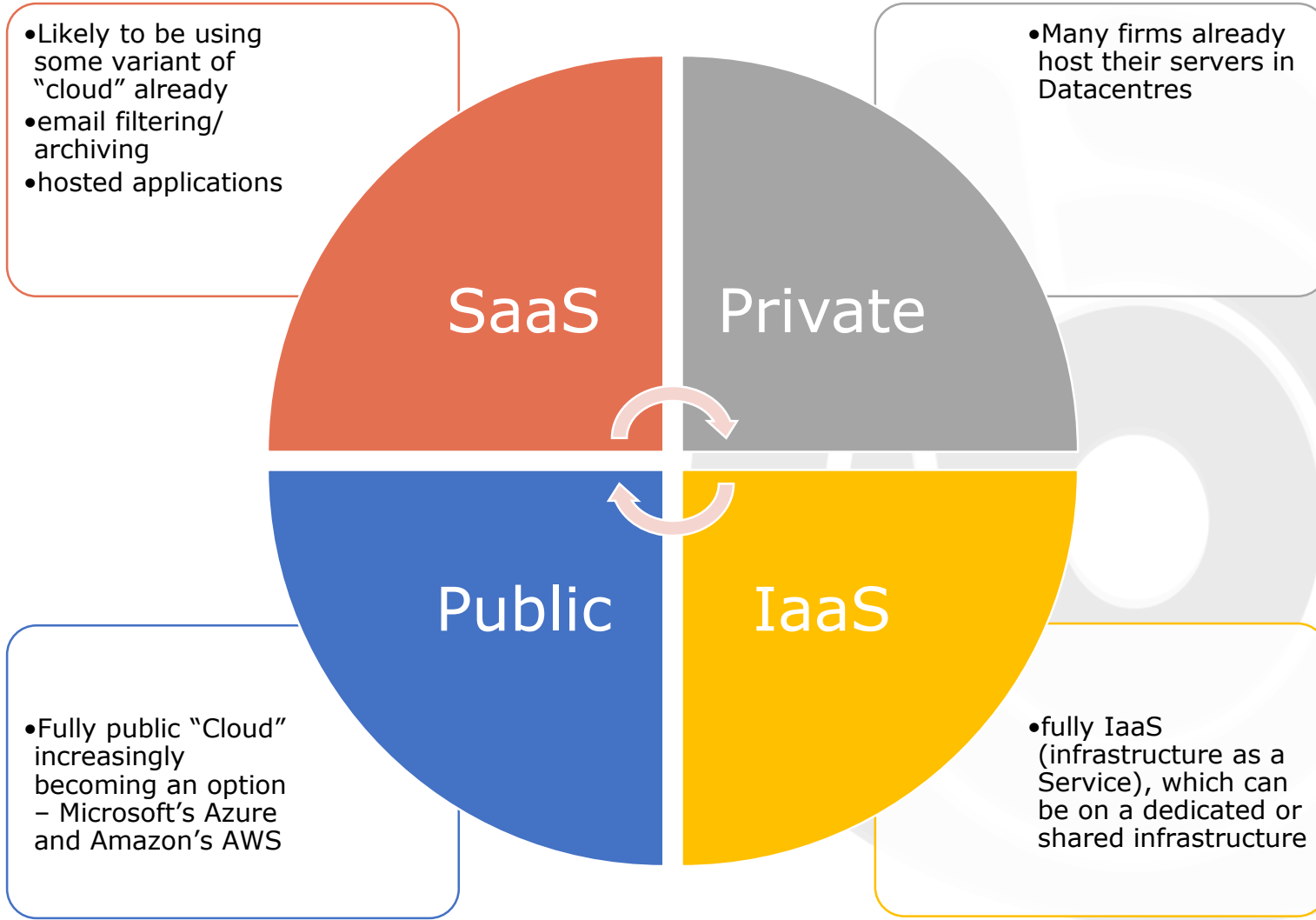**THE LIST IS FAR FROM EXHAUSTIVE.  IT MERELY OUTLINES SOME OF THE QUESTIONS YOU NEED TO ASK**

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# Cloud but which cloud !?

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•Likely to be using some variant of "cloud" already
•email filtering/ archiving
•hosted applications

•Many firms already host their servers in Datacentres

## SaaS

## Private

## Public

## IaaS

•Fully public "Cloud" increasingly becoming an option – Microsoft's Azure and Amazon's AWS

•fully IaaS (infrastructure as a Service), which can be on a dedicated or shared infrastructure

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# Not every cloud has a silver lining

## Control

- You are critically dependent for the service (or your entire infrastructure) on a third party

## Transparency

- Lack of transparency

## Contractual

- Should your chosen supplier prove unsatisfactory, for whatever reason, it will be very difficult/expensive to move, and it may cause significant business disruption

## Relationships

- Managing the supplier relationship requires different skills, which your in-house team may not have

## Hidden Costs

- Hidden on-going costs may come as an unpleasant surprise

## Complexity

- In particular, the pricing and costs of Azure or AWS may require a PhD in rocket science to fathom

**CAVEAT EMPTOR!**

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# ...the pot of gold

## Infrastructure

- "not your problem"
- Flexibility - allows for growth, more resources required by changing software requirements
- Improved performance and resilience

## Finance

- No massive investment due to renewal cycles
- Opex instead of Capex model may be more suitable
- Economy of scale

## Staff

- In house staff can focus on added value, without having to be burdened with routine maintenance and BAU

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# What's going on ?

Kevin Goosman

# "Staycation" or Exotic Cruise?

- Remain close to base or even stay at home to do some essential maintenance.

- In other words, work on the basics first:
  - IT Strategy
  - PMS
  - DMS

# The PMS Replacement Drive

## The Challenge

- An estimated 60% of the top 200 firms are using a PMS which has been made end-of-life
- It is thought this 60% is indicative of the wider market
- Firms have invested in PMS but not receive the benefits

## The Market

- Some suppliers have been around for years
- Some systems with large client bases have being made "end-of-life"
- There have been new entrant

## No Choice

- Some firms will be forced to undertake change
- Equivalent of having a leaky roof – you have no choice but to resolve.

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# Turn a negative into a positive

- Reconsider your current PMS:
  - Upgrades - up-to-date?
  - Enhancements - taken?
  - System Usage - regularly reviewed?
  - Business Processes – changes built-in?
  - Training – Does it need a renewed push?

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# A Likely Journey

If you need a change,

then you need to know...
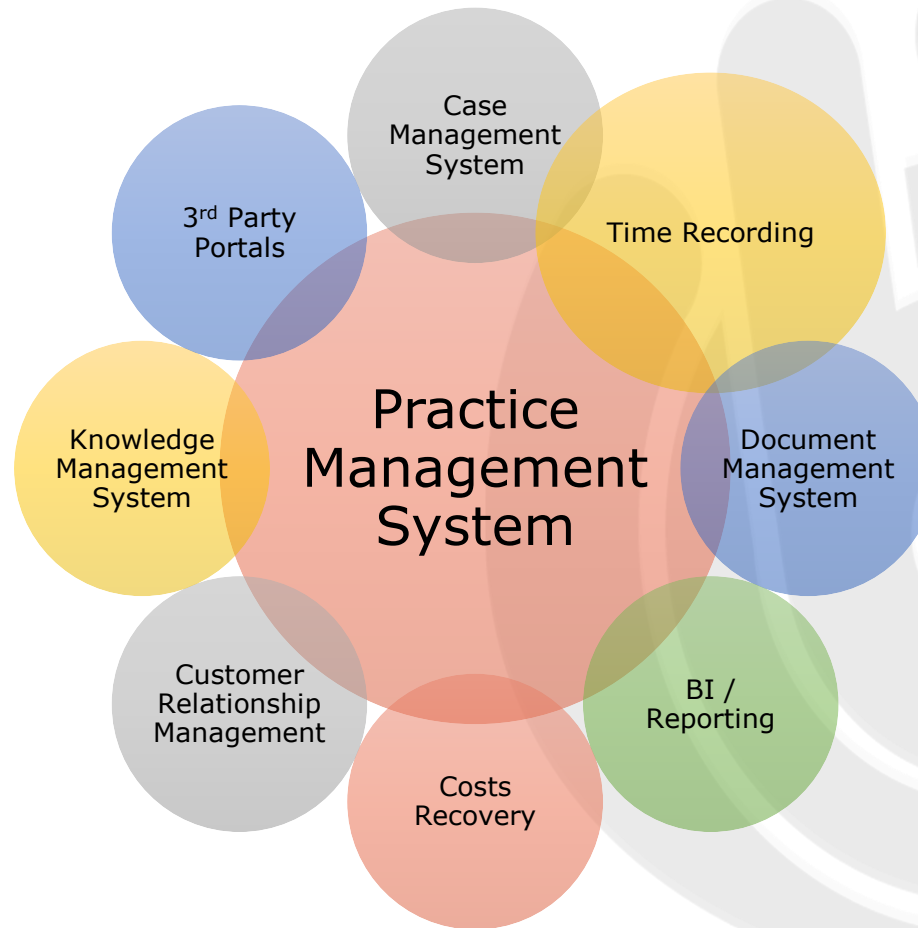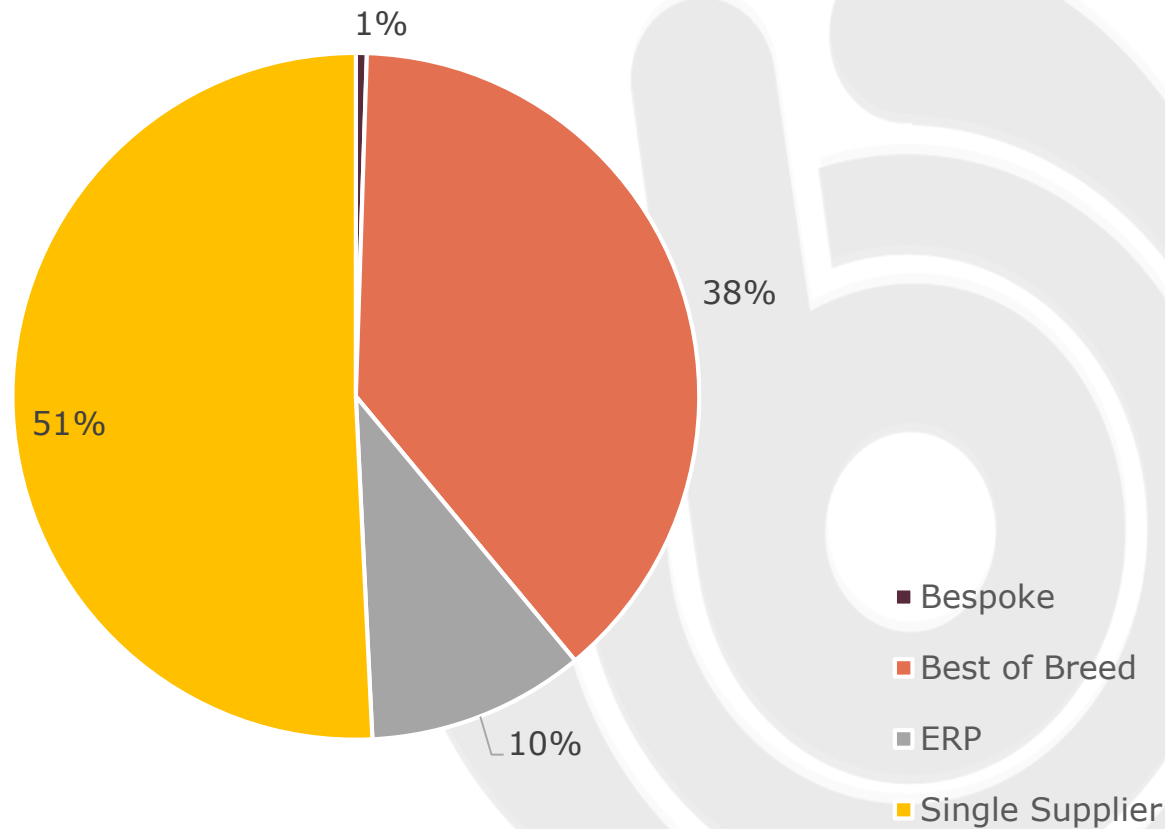
The PMS market has changed!

But then so have you..

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# The Modern PMS

## Practice Management System

- Case Management System
- 3rd Party Portals
- Time Recording
- Knowledge Management System
- Document Management System
- Customer Relationship Management
- Costs Recovery
- BI / Reporting

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# Market Overview – System Type
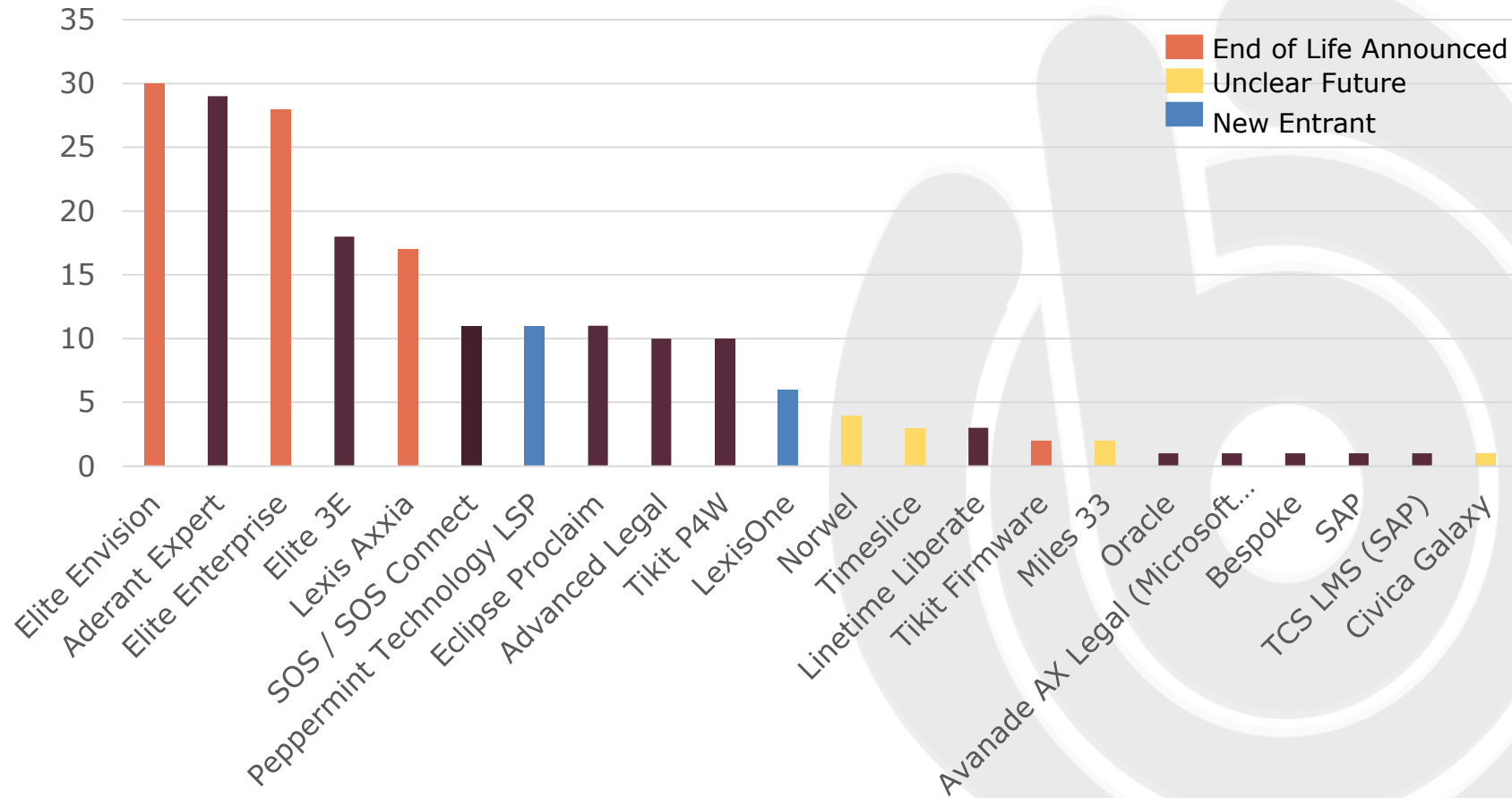
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1%

38%

51%

10%

- Bespoke
- Best of Breed
- ERP
- Single Supplier

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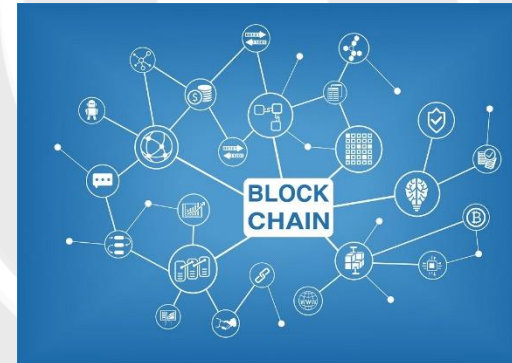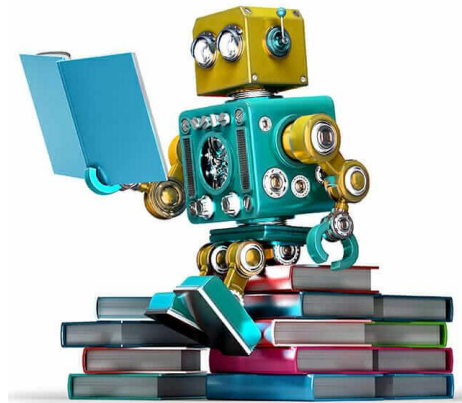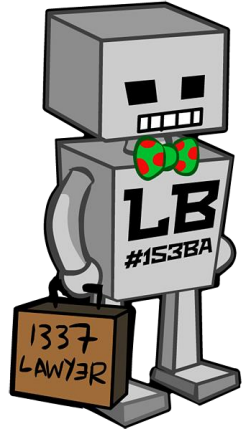
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# Market Overview – Systems in Use



Legend:
- End of Life Announced
- Unclear Future
- New Entrant

Chart data (approximate values):
- Elite Envision: 30
- Aderant Expert: 29
- Elite Enterprise: 28
- Elite 3E: 18
- Lexis Axxia: 17
- SOS / SOS Connect: 11
- Peppermint Technology LSP: 11
- Eclipse Proclaim: 11
- Advanced Legal: 10
- Tikit P4W: 10
- LexisOne: 6
- Norwel: 4
- Timeslice: 3
- Linetime Liberate: 3
- Tikit Firmware: 2
- Miles 33: 2
- Oracle: 1
- Avanade AX Legal (Microsoft...): 1
- Bespoke: 1
- SAP: 1
- TCS LMS (SAP): 1
- Civica Galaxy: 1

# Single Solution

## Infrastructure & Supplier Management

- Fewer system integrations
- Less overhead on IT "keeping things running"
- Simplified licensing and support contracts

## Data Management

- Data is stored once and available throughout solution
- Record management by "stealth" via regular usage

## End-Users

- Greater ease of use and single application to be trained on

## Cost of Ownership

- Possible cost savings

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# Lets Get Real

David

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# Buzzword Bingo

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# Standard "AI" technology in use

## Document Automation

- Precedent Banks
- Bulk "Mail Merge"
- Legal Forms
- Q & A Document creation

INTELLIGENT DRAFTING
**CLARILIS**™

**HOTdocs**™

## Document Review

- Document indexing
- E-Discovery
- Search

**RAVN**
Power of Understanding

**RECOMMIND**®

**Luminance**

**opentext**™
The Information Company

## Process Automation

- Case Management
- Business Automation
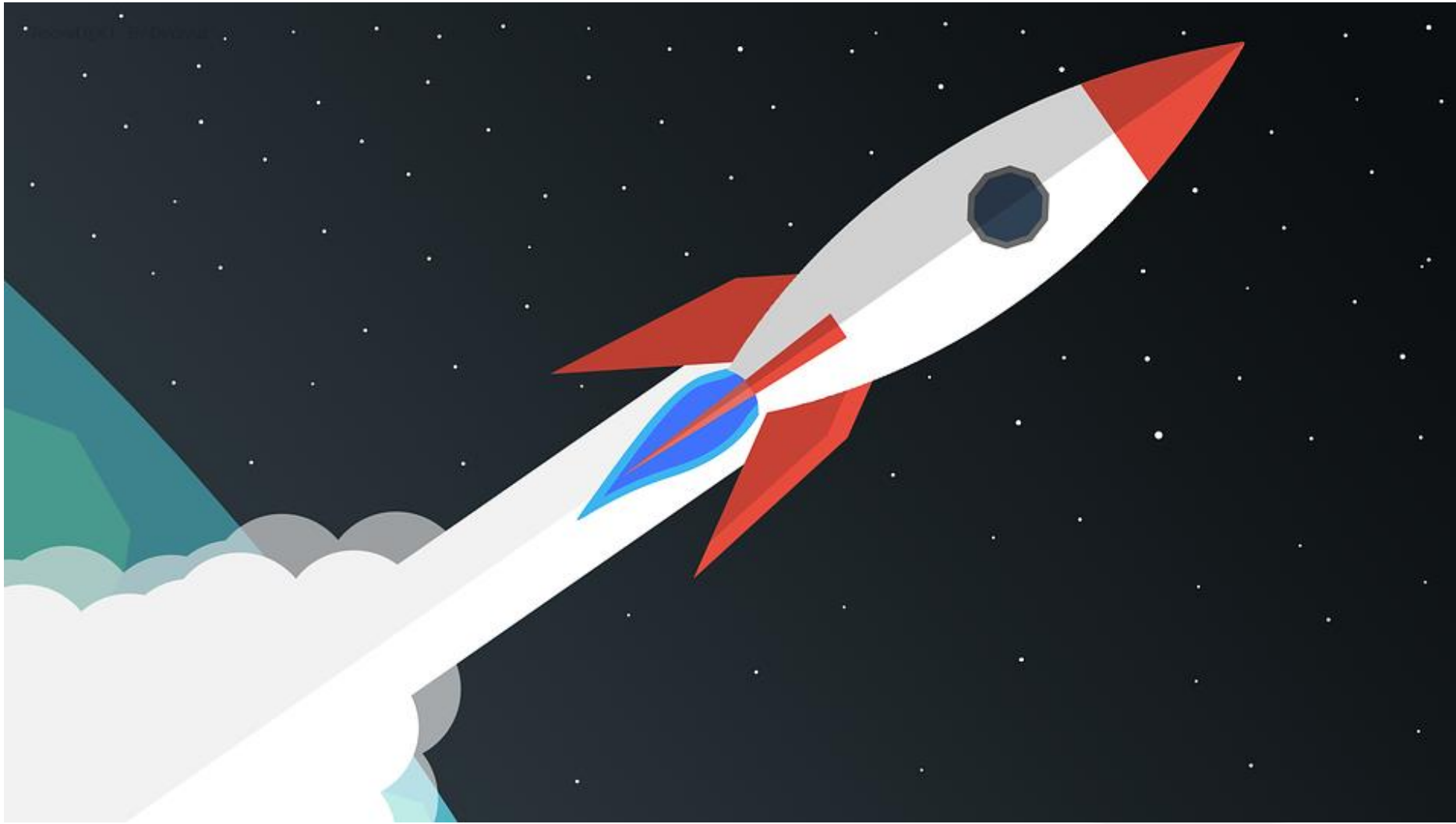- Automatic steps

## Machine Learning

- Speech Recognition
- Reporting
- Security

**TESSIAN**

Hey Siri

**BigHand**

# Yes It is Rocket Science !

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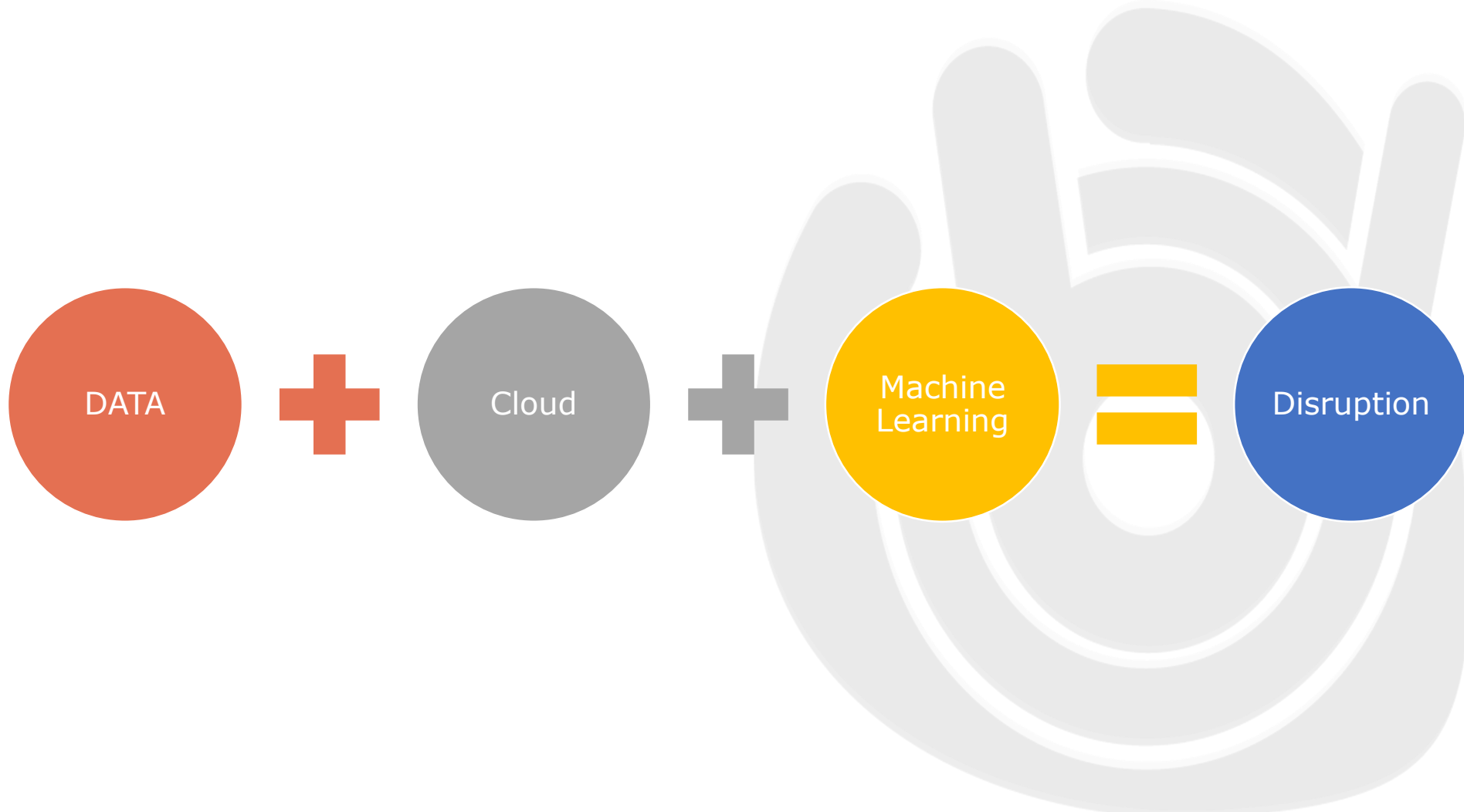
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# Digital Disruption

DATA **+** Cloud **+** Machine Learning **=** Disruption

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# So what ?

**Processes**
- Streamline "Administrative" Processes
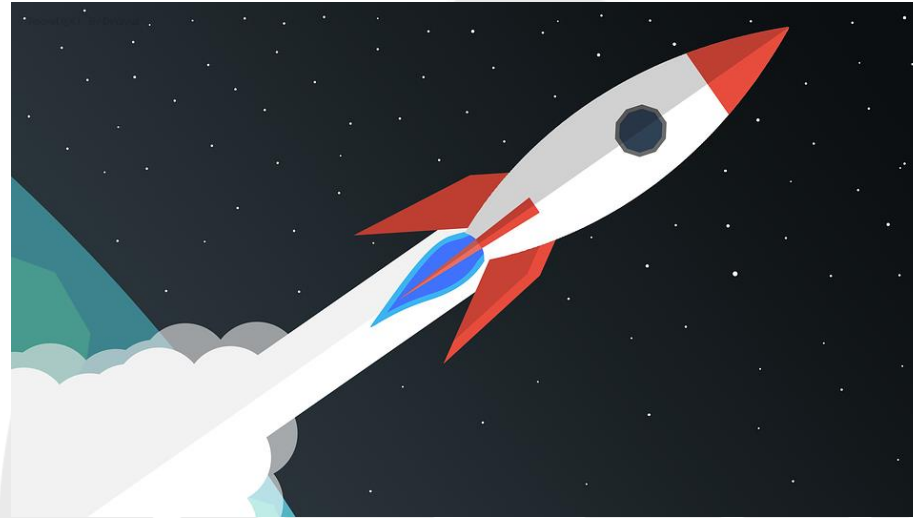- Supportive Case Management

**Documents**
- Template where possible
- "Wizardfy" documents where possible

**Efficiencies**
- Make use of the tools you have
- End-user training and education

**Plan**
- Watch the market
- Take demos / conferences
- Consume don't build



## THE SMALLER THE ROCKET THE LESS FUEL IT NEEDS

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# The Millennials are coming

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# What is expected to change

## Mobility
- Expect to work whenever, wherever
- Expect technology to "just work"

## Life Balance
- Expect flexible time
- Don't expect to put work first

## Knowledge
- Highly educated
- Not interested in basic, repetitive tasks

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# Round Table Discussions

**Table 1 & 2 – Infrastructure**
- How pressurised are you to follow your peers rather than to assess your business's needs ?
- What are the obstacles in adopting "cloud" or consumption of "commodity" IT services

**Table 3 & 4 – PMS**
- Is your PMS doing what you hoped it would do ? How have you managed the ownership and enhancements since the "big bang" of go-live ?
- What do you think of the current market ? How do you go about selection ?

**Table 5 & 6 – "Disruptions"**
- How real is "AI" and what are you doing about it ?
- Are the Millenniums "attitudes" really a bad thing or are they just reflective of where technology is going ?

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# Thank You

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