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Flying monkeys



Richard Brent is the editor of **Briefing**. He likes to get out and meet as many of you as possible, so contact him at richardb@briefing.co.uk



Kayli Olson is **Briefing**'s assistant editor. She finds lots of stories and data. Care to contribute? Contact: kaylio@briefing.co.uk



Holly McDaid is **Briefing**'s client services manager, responsible for managing supplier insight. Contact: hollym@briefing.co.uk

Wicked witches



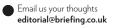
Rupert Collins-White is Burlington Media's creative director. Contact him at: rupertw@briefing.co.uk

Sarah Cox is Burlington

Media's head of client services. Contact her at:

sarahc@briefing.co.uk





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 Briefing magazine
 Burlington Media Group
 20 Mortlake High St
 London SW14 &JN
 DX 36356 East Sheen

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Editor's letter



n March 2018, the Legal Services Board approved the framework for the Solicitors Regulation Authority's planned introduction of the Solicitors Qualifying Examination (SQE) – bringing this so-called 'superexam' format for new lawyers a step closer.

The regulator stressed this doesn't mean the introduction of the SQE automatically follows. It'll now need to scrutinise the SRA's subsequent proposals for the specific rules needed to introduce it – but it expects these to appear in 2019. Chief executive Neil Buckley explained: "The LSB will expect to see more detail from the SRA – particularly on how the SQE will operate, what it will cost and the likely diversity impacts." There are currently very divergent views on the latter point.

HR departments already have quite a bit on their plates in terms of reappraising the skills mix they need

Some express concern about the prospect of 'crammer' courses popping up that could place the better-off at yet another advantage. But the SRA maintains that, as well as establishing a common standard, the regime should widen access by cutting upfront costs and enabling more to opt for pathways such as apprenticeships over university.

Either way, law firms need to factor this into their talent strategies. In the words of SRA chief executive Paul Philip: "Confirmation that we can press ahead with the development of the SQE gives employers and education providers the surety they need to plan fully for its introduction. Law firms and academic institutions can now design approaches to recruitment and training which reflect their specific needs."

But it also comes at a time when law firm HR departments already have quite a bit on their plates in terms of reappraising the skills mix they need. As we cover in this issue (p12), alternative career paths once you've made the grade are back on the agenda. Here, it's not so much diversity or retention issues like work-life balance driving change, but the development of a workforce that needs to get much more acquainted with a proliferation of technology hitting legal service delivery. Cost-saving strategies such as investing in automation tools and welcoming 'AI' into the fold aren't necessarily just going to disrupt the market for legal services. There's an argument they also risk significantly disrupting the delicate talent development deal in the very organisations they're out to optimise.

RICHARD BRENT EDITOR

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t's one time of year when thoughts can easily turn to making a fresh start or two – and first up for us this month, law firm **Reed Smith** is kicking off a fresh, new strand to its strategy in a brand new location.

Reed Smith Global Solutions has selected our very own Leeds as the first home of some new working practices designed to improve problem solving. Business services, lawyers and analysts will work side by side, and new offerings draw on models already in the mix over in the US (and which are to be integrated in due course).

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Now at work for Hugh James at new London home 99 Gresham Street, and room to expand with 15 more

For example, the firm has had a global customer centre (GCC) in Pittsburgh since 2003, providing IT services alongside accounting, HR, business intake, conflict analysis and docketing. On the legal side, there will now be a European version of the firm's records and e-discovery practice, plus plans to hire more associates and paralegals in several areas.

As Tamara Box, managing partner for Europe and the Middle East, put it in a press release: "With its strong talent pool, high-quality real estate, growing technology offering and two-hour connection with London, Leeds is the perfect location from which to launch our billion-dollar startup." With an open-plan layout, the firm says, there will be a push for more intra-department collaboration in the interests of continuous improvement. London managing partner Andrew Jenkinson said: "We recently conducted a detailed audit among our business services leaders and chiefs across marketing and BD, knowledge management, IT, human resources, operations, finance, and client value, to find out what they believed to be the key areas for improvement

focus. The overwhelming concern was how to find a solution for improving the quality of our services while also increasing the efficiencies of each function.

"Reed Smith Global Solutions is our answer. It will be the centre of process design innovation enabling our people to focus on ideation, delivery and ultimately improving client service."

Another firm making some staff changes is **Allen & Overy**, which has taken applications for a new London graduate scheme – where in September 2018 the chosen few will start sixmonth rotations around the firm's project management office, legal technology team and other areas that fall under the banner of 'advanced delivery'. The lucky four will be resident at A&O's tip-top tech innovation space Fuse – which opened in 2017 – and are being funded for a recognised qualification in project and/or process management as applied to legal services.

Louise Forrest, head of legal project management, said: "The law firm of the future isn't just about the lawyers – we've launched this scheme now so that we can shape junior project managers and legal technologists into the professionals that A&O and our clients will need in order to manage the great risks and even greater opportunities that technology presents."

(Read **Briefing**'s main feature this issue – from p12 – for more on how firms appear to be in a period of reassessing the blend of skills they need to thrive in future.)

Also on the move in April was the London office of **Hugh James** – into 4,000 sq ft at 99 Gresham Street. It had "outgrown" its former space, says managing partner Alun Jones, but is also mapping across IT systems, lean working and other collaborative practices from a recent new home in Cardiff. Reed Smith Global Solutions has selected Leeds as the first home of some new working practices designed to improve problem solving. Business services, lawyers and analysts will work side by side

Jatabas

Spend goals

We know procurement professionals are on the rise, and they're gaining greater business power. A new survey from Buying Legal Council sheds a little extra light on what law firms should know about what to expect

First, better analysis of spending data tops even reducing legal spend as an overall goal among legal procurement professionals in 2018 (although reducing spending has itself surged from sixth place to second).

And what tactics are your clients using to achieve these goals? Well, quite a number it transpires – with a lot more of them expected to diversify approaches into new areas in the near future. Big expected risers are legal project management (from around a quarter to three-guarters of all respondents) and the running of e-auctions and invoice audits.

How important are the following goals in 2018 (scale of 0-10, 10 = most important)?

Better capturing and analysis of spend data 8.32

Reducing legal spending 8.23

Better managing legal work 8.11

Implementing formal strategies and processes 7.84

Improving relationships with the legal department 7.03

Reducing the number of firms or legal providers 6.57

Which tactics are procurement teams presently using, and which do they plan to adopt?

Negotiate discounts	88%									<mark>8</mark> %	
Issue RFPs	76%							17	'%		
Sourcing and purchasing strategies	75%							18	%		
Issue and enforce outside counsel billing guidelines	74%							189	%		
Establish a panel/preferred list of vendors	72%							25%			
Require eBilling	69%						2	2%			
Negotiate AFAs	65%						31%	6			
Conduct data analytics	63%						33%				
Freeze rates	60%					21	1%				
Pre-matter scoping of work	46%				41%						
Conduct invoice audits	44%				36%						
Apply legal project management	27%		50%								
Run e-auctions	18%	<mark>26</mark> 9	%								
	🔲 Use tactic 📕 Plan to use tactic 📕 No plan to use tactic										

Source: 2018 Buying legal procurement survey, Buying Legal Council (survey of 153 legal procurement professionals)



WHAT'S ON YOUR WHITEBOARD?



Adrian Spencer was appointed BLM's first business improvement director in 2016. How has the world of change at the firm transformed for the better as he approaches his first two years in the job?

What brought you to BLM?

A I was previously a claims director at Zurich Insurance, which is one of BLM's largest customers. One of the NEDs here also used to be chief executive at Zurich, and I was essentially approached to carry out an end-to-end review of the firm. It's a broad remit, covering all areas of the firm, from improving operational excellence to building strategic capability and developing our analytics proposition for the market.

What's the most strategically significant change you've brought the firm so far?

20 or so months later, we've A done an awful lot – but the honest answer to that is probably a joined-up change agenda itself. It now has a brand, momentum, focus across the leadership and boards, and people can see the change efforts starting to deliver. We've just announced a knowledge transfer partnership with the London School of Economics - which is ridiculously exciting, even for the brand alone - and we're about to roll out a new financial dashboard: BLM Drive. Every

fee earner has it pop up every single day, showing performance around hours, billing, and so on. It will also transparently show them and their managers what to do to improve.

Can you give us a top tip for driving change in a smarter way in a business like BLM? I'm a very passionate A believer in the power of horizontal integration. For example, I have a business data manager – a lawyer – in my team. She'd probably normally report up to me, but here she also reports to the go-to-market director. IT director, finance director - anyone who needs her data insight for their own performance. Data is one investment where impact most definitely spreads right across an organisation, so organisations need to accept such different reporting lines (if they haven't already), especially if they want things to happen at higher speed.

What 's the most challenging change initiative or strategy you've been involved in at any point in your career?

The area where I've probably learned the most from difficulty is outsourcing. There was a big push to India in the insurance industry 10-15 years ago, and outsourcing well is fraught with challenges. First, will something still be 'non-core' – which you've implicitly decided – in a few years' time? And the implication of an outsourcer getting something wrong is also extremely hard to manage – unless a service level agreement is so robust you can see them at work on a daily basis.

Q Is there an area of talent that's most in demand in your team or remit?

I do see value in the A increasingly hybrid lawyer - having a lawyer that also 'does change'. You get the credibility, as well as the legal insight. But we also need real change specialists, such as the lean green and black belts. Now we've the buy-in for all of that, I'm building a new 'operational excellence network' - lawyers from across the firm who we'll train up in change and 'lean' fundamentals under black-belt tutelage. That way we'll work from the ground up, both to take out waste and help lawyers work smarter.

O Describe BLM in three words ... or even fewer. Embracing the future. **OPINION**

Multiculture matters

In 2017, Herbert Smith Freehills was one of 66 organisations named in the first list of the Best Employers for Race by Business in the Community. Adam McCann, diversity and inclusion manager for the UK, US and EMEA, explains its commitment to cultural diversity in more detail



A t Herbert Smith Freehills, celebrating diversity is a key element of our inclusive culture. Our diversity and inclusion strategy supports the firm's business strategy and is framed around four key pillars: talent, clients, innovation and values. With the aim of being a leading global law firm for diversity and inclusion, the strategy leverages lessons from the past to further embed diversity and inclusion in the culture of the firm.

Our commitment to providing a diverse global client base with innovative advice, and diversity of thought, strengthens the importance of attracting top diverse talent.

Over the past seven years, monitoring has become a critical aspect of our programme. In line with the requirements from the Solicitors Regulation Authority, the firm reports annually on the demographics of UK staff. And the firm's annual UK diversity audit (which became global in 2018) provides an immense amount of data, which is formulated into action plans for both staff diversity networks and practice groups.

However, monitoring in isolation doesn't create organisational change. A genuine commitment from colleagues across the business does. The audit has gone from strength to strength, year on year. And analysing trend data has reinforced the firm's business case for diversity and inclusion. It has been instrumental in measuring strengths, challenges, and impact, all critical components to any diversity and inclusion strategy.

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Multiculturalism has been one of the three global strategic priorities for the firm in this area since 2015 - and in November 2017 the firm was proud to be recognised as one of a handful of law firms in the inaugural UK list of the best employers for race. In recent years, the firm has strengthened its commitment to recruiting top talent that's more reflective of the ethnic diversity of law/non-law students in the UK. Via the annual diversity audit, we monitor ethnicity, and we have seen the percentage of BAME trainees, for example, increase from 14% in 2013 to 31% in 2017. In the UK, practical steps we have taken include partnering with Rare recruitment and Sponsors for Educational Opportunity (SEO) to attract top BAME graduates. We have our annual Roger Leyland Memorial Excel scholarship in partnership with Rare, participate in the Warwick University BAME mentoring programme, and sponsor the Afro-Caribbean societies of London universities. We also hold a joint graduate recruitment event, with the firm's multiculturalism network, celebrating multiculturalism in the City. These initiatives have all been instrumental in creating change and tackling bias.

Additionally, the London multiculturalism network provides a forum for engaging with clients, educating colleagues about cultural diversity, and celebrating race, ethnicity, nationality and religious and faith backgrounds. The network supports the development of diverse talent via a broad programme that covers career progression, role models and mentoring.

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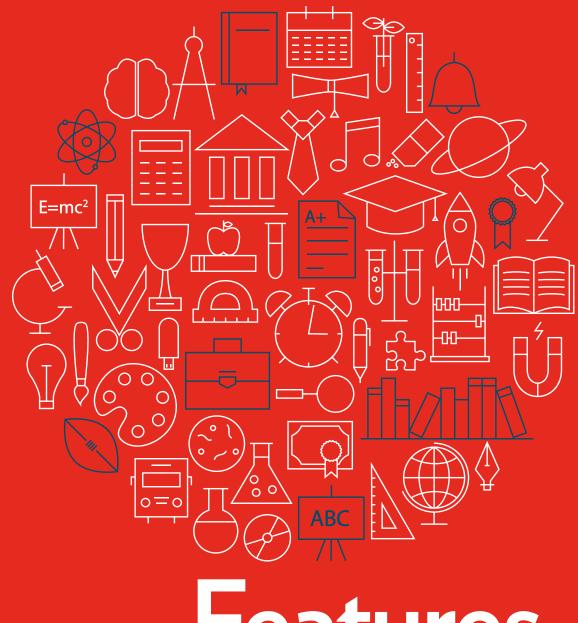
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The big idea

Technology means firms are once again turning their attention to options for alternative career paths. Richard Brent reports

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Team profile

The client relationship management team at **Shoosmiths on** finding new ways to optimise experience



Path binders

Machine-learning law means alternative career paths are firmly back on the management agenda. Richard Brent reports

I

t's around a decade ago now that law firms began to realise they'd need to offer lawyers some alternative career paths to partnership. Managing associates,

legal directors and several other job titles were suddenly announced, as a response not only to the fact people may not fulfil their long-held ambition – and of course, the firm may not want to lose them – but also that a new generation of employees might not be prepared to wait for their ultimate reward, if they even wanted it at all. People were moving on more frequently, more open to a career change, freelancing was on the rise – and an excessively long-hours culture was already not a good look.

In an industry that has never been one for changing at pace, some are still unveiling their new design solutions to this management challenge. However, one thing has certainly changed in the intervening years – and it's now adding another dimension to the need for new career paths. As technology has taken on an ever-greater proportion of less-exciting duties, this either heralds (it depends who you ask) the dramatic 'end of lawyers' in the distance, or calls for a skills audit. Certainly, if 'artificial intelligence' is identifying clauses, drafting documents and doing due diligence in a fraction of the time (and with greater consistency), firms need to consider what those

people do with their time now. If they stay, they'll need to be upskilled, retrained, or at the very least given some alternative work to do. And if they leave, what does that mean for the career path up to the partners (or equivalent) of the future?

Add to the mix that law firms suddenly find themselves competing for top data scientists, process specialists, and more, alongside their legal talent, and HR arguably faces some pretty fundamental questions.

Offer a seat

No doubt plenty of thought has been expended on all of this behind the scenes. But it's fair to say that 2018 so far has also been a year of some firms taking specific actions.

In March 2018, for example, Addleshaw Goddard announced a new career path for its trainees, not only offering them a seat within its innovation and legal technology team, but also the opportunity to qualify into this team – which has a particular focus on mapping legal processes and developing solutions that can quickly interrogate, "If you're automating a document you still deploy your practical skills, as you need to understand what makes up that document. You can learn a lot about legal work through building solutions to facilitate that work."

Kerry Westland, head of innovation and legal technology, Addleshaw Goddard

automate, analyse and manage assignments to deliver greater efficiencies. Kerry Westland, head of innovation and legal technology, says the first trainees started in September 2017. Another two arrived in March.

She continues: "In a traditional law firm training contract, the lawyers rotate their four or six seats – whereas our trainees will still spend some time in other divisions, but the majority will be within the innovation and legal technology team developing and customising solutions.

"At AG we try to combine lawyers who understand tech with technologists who understand the law. If you're automating a document you still deploy your practical skills, as you need to understand what makes up that document. The same is true with applying tech to the different stages of a case in litigation. You can learn a lot about legal work through building solutions to facilitate that work."

On top of this, some of AG's lawyers with more business experience (three or four years PQE) now have the opportunity to be seconded to the innovation and legal technology team for six months. "They've used our systems for some time in their day-to-day practice, but they obviously haven't developed them," says Westland. "They'll learn new skills, but also be able to bring their years of practical knowledge to improving development of future systems."

But it's clear that as well as addressing individuals' skills needs and continuous process improvement, this is an exercise in re-educating the whole firm. As technology skills grow in importance, the age-old barriers between lawyer and 'non-lawyer' are blurred even further, creating new channels of collaboration and greater crossfunctional understanding.

"After the six months, the idea is that these lawyers return to their practices as champions," continues Westland. "They can now act as the go-to person in their departments, because we want lawyers to bring ideas to innovation based on their day-to-day work. That line of engagement is really important."

Daniel van Binsbergen, CEO of Lexoo - which matches pre-screened freelance lawyers with suitable work for a fixed fee (and asks clients to rate the results) - recognises a similar opportunity. "The increase in legal tech tools and AI applications will enable lawyers to become more efficient, rather than replacing lawyers altogether," he says. "However, if you look at a traditional career path, junior lawyers at large firms regularly get the type of work most likely to be automated in the future. "But I believe there is an opportunity to make use of the relative tech-savviness of junior lawyers by giving them opportunities to work in the intersection of the 'training', or implementation, of these tech tools and the more traditional delivery of the legal work.

"Lexoo is about to start a collaboration with a magic-circle firm, where a select number of future trainees will spend several months interning within the heart of Lexoo, where they'll get exposure to how tech products are built and what's happening at the cutting edge of legal tech. This is a great way to prepare junior lawyers for an unpredictable future, and this type of initiative can help set law firms apart in their efforts to retain and attract talent in the future."

Coding conduct

Clifford Chance is also responding to a need for more firm-wide technology knowledge and awareness. Launched in April 2018, a new global training programme portal – 'Tech Academy' – includes online webinars and videos, hot topic 'summaries' and links to external resources.

Tim Sherwood, director of the wider Clifford Chance Academy (the firm's central learning and development function), says: "The academy's courses have reflected many new priority areas in the last few years, including client service, relationship management and commerciality."

Now, as well as "foundation content" on areas such as artificial intelligence, blockchain and smart contracts – plus, a "glossary of mysterious terms" – he says employees can also access two programmes of coding training through Tech Academy. "The basic training is open to anyone who is curious about coding for any reason. The more advanced option is pitched at more senior lawyers whose work will be enhanced as a result. This is happening through self-application and nominations. It's not mandatory for anyone."



"There is an opportunity to make use of the relative tech-saviness of junior lawyers by giving them the opportunities to work in the intersection of the 'training', or implementation, of these tech tools and the more traditional delivery of the legal work."

Daniel van Binsbergen, CEO, Lexoo

However, elements will also be blended into existing courses, such as business development training and the firm's 'milestone courses' based around set career stages. "Plans for the future include more sector-specific content," he says.

In addition, an Australia-based consultancy, Collective Campus, will host a series of new full-day workshops in different countries throughout the year.

"The courses are open to all levels of lawyer and business services based on need and personal assessment of awareness levels," says Sherwood. "We're also tracking activity in Tech Academy as well as attendance at the face-to-face training to constantly monitor which of our offices and practice areas are the most engaged, and where we need to raise further awareness, or adapt courses in the future."

Van Binsbergen at Lexoo adds: "When it comes to adoption of tech, the main stumbling block seems to be the willingness of a lawyer to try it. I remember when I worked as a senior associate within a law firm there was sometimes a sense of acceptance among lawyers that they 'didn't understand software', and didn't feel like they ought to.

"But so much of the software out there today is very intuitive to use, so that kind of attitude is neither justified nor helpful. It would therefore be good to teach junior lawyers early on that navigating legaltech software is simply part of their jobs, isn't scary, and that staying up to date with new innovations will help them to get ahead."

Time to transfer?

Another management team with future skill needs on the mind is DWF. And it's addressing that by bringing one very specific set of skills in from the outside for an extended period. It's one of a handful of top 100 firms to apply successfully for an academic knowledge transfer partnership (KTP) in the past 12 months, in this case with the University of Manchester.

Managing director and head of development at DWF Ventures, Jonathan Patterson, says: "The first stage is to use the university's data-science capability and experience to carry out what is almost a diagnosis of our strengths and weaknesses in organisational data, and identify opportunities for us to improve."

It's key that the university has carried out similar projects for other industries, he says. It can bring that broader knowledge to bear on the firm's self-reflection. "The second stage will then be a set of strategic recommendations for adapting the business model, processes, systems, and so on, to get to where we need to be.

"You can't pre-empt the outcome, but there's certainly potential for different roles and skills, as with an improved dataset you can become much more effective at configuring automation and AI systems to perform particular tasks. There's a likely shift away from quite as much lower-level process work to more configuration and training systems with data."

However, data scientist Mayowa Ayodele will oversee the KTP project for a full 30 months – and who's to say how the world might change even in that time? "There are five stages in total," says Patterson. "At the end of each there are presentations to functions and stakeholder groups, which will include the graduate recruitment, skills development and role definition perspectives."

Not that all the ways talent definitions might need to change in future necessarily hinge on powers with data. DWF has also developed an online 'innovation kitchen' programme, where employees can log on and progress through exercises to gradually learn, through experience, what thinking 'more innovatively' about business really means.

Patterson explains: "Increasingly, the development of left-brain logic and reasoning in the legal trainee needs a complement of right-brain creativity and innovation skills. The challenge for firms is to institutionalise these things – skills and behaviours – so that they don't only happen in pockets, or by accident."

At initiatives such as DWF Ventures – itself a client-focused 'ideas incubator' under the DWF Connected Services umbrella – the case for different skills is perhaps more obvious than in more traditional legal teams. "One thing I do is send them [DWF Ventures] to spend a day immersed in the approach of another organisation that does innovation," says Patterson.

"However, I'd be wary of suggestions that every lawyer need to learn to code – or should have X number of innovation hours a week. It needs to be a lot more targeted to the specific area and the skills required to deliver an outcome to a client."

Westland at AG adds: "There's certainly a big focus on technology now, but it isn't everything. It's possible we'll even be nurturing more tech and IT professionals to better understand the law, as it's sometimes the technology integration where the work is most challenging.

"Firms are all approaching it slightly differently, but in truth sometimes what you most need is for individuals to grab the opportunity and help to develop it for themselves – as they do. Roles are in development right now that we don't yet know are going to exist."

TEAM PROFILE

Conversation smarter

Richard Brent hears the client relationship management team at Shoosmiths are official champions of a culture determined to keep listening more – to clients, internally, and anywhere else it may help. What can we learn from what they've heard so far?



n late 2017, Shoosmiths was ranked second overall in the annual Nisus Consulting brand promises and service realities report. Canvassing

the views of some 2,000 in-house counsel and general managers, as management surveys go, it's probably one for firms to give the once over. If they did, they'd find that this firm also came fourth for client loyalty (plus, possibly related, value for money), with a 13% year-on-year increase in the net promoter score – the client's willingness to recommend it to others.

This may be in no small part thanks to the client relationship team – which has been a part of the cultural life at Shoosmiths since 2007, and has its sights set on greater recognition in 2018.

For client relationship manager Andy Moorcroft, it's also his first law firm – he has previously worked in other professional services firms – and the big priority is catching up with clients in person as often as possible.

"The thing that immediately struck me about the firm is the trust client partners place in you to be out meeting clients, without them necessarily holding your hand. In my first month or two, I was already out conducting a client listening with the head of legal at a key automotive client."

The whole story

Appropriately, listening emerges as quite a theme in this conversation. Team founder Nicola Potts is a former journalist, for her sins – and although she now spends more time collaborating on strategic matters with other functions such as finance and HR than with clients, the remit certainly includes spreading an active 'listening' culture by telling plenty of stories.

It's reflected in a number of initiatives spearheaded by senior client relationship manager Nancy Allen.

"We've set up a collective client feedback inbox, where anyone can forward any praise they receive in an email, and it's then shared in that exact same form," she says. The point is that those kind words – which are undistilled – could concern the delivery of legal work, but equally might recognise any other client touchpoint.

Then, a more recent development is a 'client investment forum' – a bi-monthly meeting between the firm's senior management and heads of practice groups, chaired by Allen – where the feedback is all presented aloud.

"It's quite humbling, as you'll hear about something like a thank you to a receptionist – and I think the initiative is quite indicative of our top tier being tied to the front line," she says. "It also helps to show that everyone's performance and opinion is valued – that Shoosmiths' chief executive and chair will be hearing this directly." An internal initiative in 2017 also involved all employees filling in postcards with possible ways of improving client experience. "It was

"It's really important that the account managers and bid managers are sharing knowledge effectively to tell the client story as well as possible."

Nicola Potts, head of client development, Shoosmiths



anonymous, and a great way of engaging everyone in the idea of making a difference wherever they are in the organisation – which could be as simple as answering the phone or typing a letter – as well as trying to turn client experience into a differentiator.

Collectively cleverer

Moorcroft says that clients also very clearly want to benefit from what the firm is hearing from its other clients, including in different sectors. Client relationship managers therefore each have a mixed portfolio – which can also flex to readmit a business, for example, if any level of extra support is suddenly needed. "Understanding how a range of legal heads are thinking and behaving is extremely useful," explains Potts.

"One client coined the term 'collective clever'," adds Allen. "He said he didn't just want to know the law – he wants to know if we've seen this particular type of contract or situation so many times before, and commercial insight from that. That phrase has really entered the lexicon." Also in 2017, the firm went a step further and invited clients along to an internal strategy session. Moorcroft explains: "That way it's not just us discussing what the client experience means, however useful that is. The clients are in the room to give us the reality.

"We've also started to film some footage of clients in conversation, which we then broadcast internally for the whole firm to hear. They seem very happy to take part in that."

At the same time, this team will be in regular close dialogue with the firm's collection of bid managers. "We're all relationship managers together. It's really important that the account managers and bid managers are sharing knowledge effectively to tell the client story as well as possible. The account managers articulate the reasons a client should be choosing the firm – the arguments that will win a competitive bid – and those are changing every week." Ideally the reasons get better as new work gets done.

And this is one team where an agile-working policy also has a very clear business advantage.

Shoosmiths' client relationship and bid management team. From left to right: David Chapman, Andy Moorcroft, Carole Richards, Michelle Agnew, Nancy Allen, Nicola Potts, Darren Cleveland, Mark Summerside "This is one area that needs to be more tailored than mapped. There's no single 'great idea'. The key is to be paying as close attention to the individual business as possible."

Andy Moorcroft, client relationship manager, Shoosmiths

"We're certainly not sitting down a corridor in the 'back office'," says Moorcroft. "As relationship managers, we need to be out in all the other offices, sitting side by side with the wider teams."

Allen continues: "Sometimes, PAs probably know things about clients even better than we or the client partners do – it could be a particular problem with how an invoice is put together, for example. So it's important to pull a lot of people into the conversations."

Moorcroft adds that client-listening exercises will often have PA representation, as well as trainees or paralegals, alongside the client partner – another indicator of this being a client-service culture that cuts across the hierarchy.

Knowledge empower

Ultimately, this business team is all about bringing both free and accurate feedback into the business to enable all functions to improve and progress.

But client listening is also important – indeed, crucial – to correct misapprehensions. Moorcroft says: "One client told me that innovation – which everyone probably beats themselves up about – just wasn't a priority for him.

"That doesn't mean it's not important at all, but it does go to show this is one area that needs to be more tailored than mapped. There's no single 'great idea'. The key is to be paying as close attention to the individual business as possible."

But at other times, client listening can lead directly to innovation. Allen says they were closely consulted in the evolution of a new piece of kit, for example – a 'knowledge tracker' to disseminate the most important legal updates in as userfriendly a fashion for the time-poor as possible.

"Its back to the 'collective clever' really. Two key clients wanted something to help highlight what's coming down the line for business, and when – the next three months, then six months, and so on



- and within that, what's low, medium and high priority. Together with our own knowledge manager, who sits in BD, we trialled and redesigned it with them."

Potts adds: "Lots of clients are under huge pressure to change operations, and they probably have more to teach law firms about innovating than the other way around."

"Clients are operating on tighter margins, and often have larger businesses to manage – so what's not to learn? Frankly, what's not to nick?" she laughs.

Meanwhile, she has been reading and personally championing a couple of business books from the US about building the customerservice experience in the worlds of telesales and hospitality. One is about empowering the front line to step up and help the client directly (as already touched upon) – the other, "in our increasingly digital, slightly alienating world, to create a memorable client experience by bringing the human, personal touch back in. Clients tell us that Shoosmiths gets the 'relationship' bit right, and that has become a cornerstone of our brand."

The idea of providing an experience – as opposed to just a service – has brought two ideas to the fore, she explains: "One is that to acquire and retain market share today you have to act and

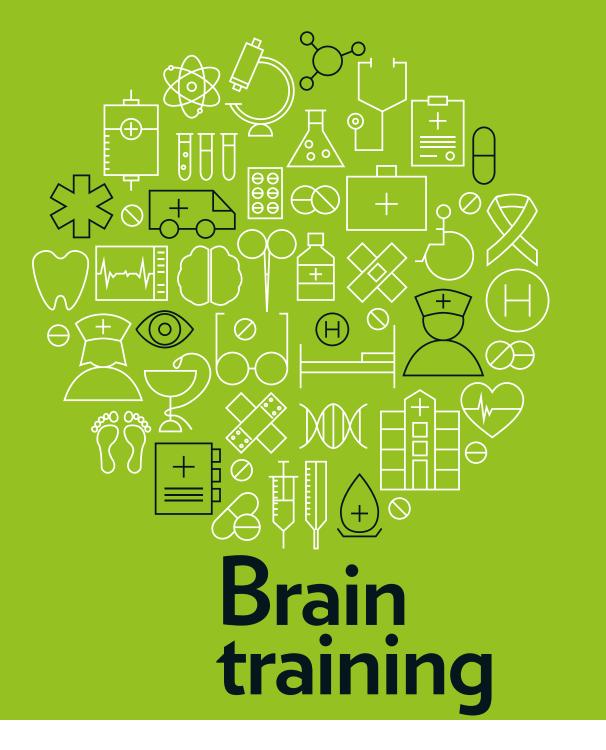
change very quickly to meet new needs – and that business loyalty is qualitative and really quite personal.

"The other is that ease of use is a factor we're starting to take seriously in the way we provide services. Increasingly, the law is a given – the differentiator is how a service is individuated."

FIRM FACTS

SHOOSMITHS Offices: 11 Countries: UK Revenue: £116.7m Headcount: 1,637 Ratio, fee earners to business services staff: 1.4: 1

18



20

Index of health

Paul Robinson, HR director, and Sue Brooks, head of reward, **Trowers & Hamlins** discuss the journey of refreshing the wellbeing agenda at work



HANDS ON

Index of health

Paul Robinson, director of human resources, and Sue Brooks, head of reward, Trowers & Hamlins, explain the route to being named one of Britain's healthiest places to work in 2017 0

ur path to our current position of wellbeing has been a gradual and incremental one. We never set out with a specific aim in mind in terms of winning awards or getting

ranked as one of Britain's healthiest workplaces; we simply wanted our staff and partners to perform well in their roles and viewed wellbeing as being one of the ways to reach that goal. We genuinely do care about their wellbeing and want them to prosper in all aspects of their lives – in turn, increasing the performance of the firm.

For many years, we had several separate services in place, but were not linking them as well as we could have done and hadn't formed a common language within the firm to discuss wellbeing. We had a number of employees who were already engaged with the various wellbeing initiatives we ran, but we realised we needed to up our game to enable partners and staff to fully benefit from what we offer.

We started to look at all the areas of wellbeing and what else we could do to make a difference. It was at this point that we formally developed the strands of wellbeing we have in place today.

We now view wellbeing as a mixture of physical, financial, mental and social health. Blended together, these provide a platform for what is now a more holistic approach.

Physical health

As at many firms, staff can work lengthy hours, sitting at their desks most of the day. They may also eat lunch at their desk, even though our London office restaurant is a great social gathering space and serves healthy meal options.

For this reason, our private medical plan with VitalityHealth incorporates a proactive and structured approach to wellbeing – measure, understand, plan, engage and reward with healthy living incentives.

Our wellbeing team regularly floor-walk, providing personal guidance on the Vitality programme, while also advertising on posters and the intranet.

We hold an annual wellness campaign in all the UK offices, with clinicians measuring employees' bmi, blood pressure, cholesterol, diabetes risk and fitness, as well as providing wellbeing guidance. The We introduced stress management/mental health awareness training for trainees. This is delivered by the CEO of a mental health charity, who's also a former partner of the firm.

> wellbeing team also encourages employees to go along to Vitality for further information, including its free non-smoking and weight-management programmes. Attendees are rewarded with points, which can go toward things including a personal health fund for vision, dental, fitness trackers, nonsmoking cashback, a discounted gym, half-price running shoes, and more.

Financial health

With 93% of our staff members in the firm's group personal pension, communication and guidance here is also vital.

We provide one-to-one pension clinics, helping staff make more informed decisions about their pension contributions. Our online benefits site hosts a pension calculator, and regular pension presentations and the annual governance newsletter are key.

We also provide free mortgage and will-writing surgeries in the office, both of which are extremely well received, and we will provide access to independent financial advice on a one-to-one basis.

Mental health

In 2015, our senior partner signed the Time to Change Pledge on behalf of the firm, launching our mental health awareness initiative.

We introduced stress management/mental health awareness training for trainees. This is delivered by the CEO of a mental health charity, who is also a former partner of the firm.

We now provide regular training to all the firm's employees and partners, and mental health 'first aiders' (MHFAs) have been trained in all the firm's UK offices. These individuals have been trained, not to be experts in mental health wellbeing, but to act as the first port of call if people feel they need someone to talk to, or signposting to any support that may be available.

In a similar way to our physical health first aiders, they support, signpost or pass someone on to specialists - for example, the firm's employee assistance programme (EAP), an NHS GP, private GP, occupational health specialist, or organisation such as Mind. However, conversations with MHFAs are completely confidential unless the person approaching them agrees to be passed on, or the MHFA needs to report the conversation as they feel there is a health and safety risk to the person, or colleagues of that person. Specifically, we've seen significantly more referrals to our EAP. This was not used a lot until we introduced the MHFAs, providing support that staff (and partners) previously either didn't know about or use.

They are very visible in all offices (posters with their photos

are even on the back of toilet doors!) and more open conversations are noticeably happening around the firm.

Social – and beyond

A variety of sports teams, walking groups and other social events help to create bonds and make connections between staff who might not otherwise connect.

With the development of this approach to wellbeing, significant strides were already being made, but we wanted to drill down even further to find what we were missing - so three years ago we decided to enter the annual survey for Britain's Healthiest Workplace, which was recommended to us by VitalityHealth. Using this vehicle also meant that VitalityHealth could support us in addressing some of the gaps where we could improve when we received our survey results.

Britain's Healthiest Workplace provides benchmarking against other participating organisations and confirmation that best-practice solutions put in place are working, while informing future HR strategies and further changing the attitudes to

HEALTH PLANNING: TROWERS' TOP TIPS

 Buy-in from the top It's crucial to get buy-in from the top to support the programme – and for our senior partners, executive committee and board not just to agree any initiatives, but also to be seen to champion them. For example, our senior partner signed the Time to Change Pledge for mental wellbeing two years ago when we recognised mental health needed to move up the agenda, and leading to mental health first aider training in all offices, regular resilience talks and presentations and mental wellbeing being spoken about throughout the firm.
 Good communications If new initiatives are being rolled out, communication to staff and partners is also important. Examples of what has worked well for us include:

wellbeing among staff. This is completed by both the firm's management and employees.

Challenges

As always, there continue to be several challenges, and you never really reach a destination, but instead are forever looking to review and improve the offering. Current challenges include: • The need to engage more with employees who would not normally be very interested in any aspect of wellbeing. • Ensure access to wellbeing is as

easy and visible as possible.Budget constraints.

experience of wellbeing who others know and trust. These champions have been trained to understand and promote this important benefit.

A benefits portal – easy to access, with a single sign-on, attractive layout and easy to navigate (includes a pension modeller).
Posters – clearly placed in a variety of locations (including on the back of toilet doors!).

 Intranet – ensure that on logging in, users are signposted directly to the intranet where all announcements are made.

 Focus groups – we have communications groups for all fee earners and support staff, and any initiatives are discussed at them.

• All new joiners receive an induction, which includes a wellbeing overview.



Organisations should also understand from the beginning that a return on investment is difficult to show, particularly in the short term. A wellbeing programme must reflect the culture of the organisation and its values, and be genuine and authentic if it is to succeed. But we have found a reduction in referrals to our employee assistance programme service, and in sickness absence year on year, and attribute some of this to the impact of our programme.

We find external recognition to be a motivator rather than an objective in itself, but nevertheless we were delighted to receive the HR in Law award for best health and wellbeing initiative in 2017, and even more recently to be recognised by Britain's Healthiest Workplace as one of the top-performing organisations in the mediumsized business category.

Organisations should understand from the beginning that a return on investment is difficult to show, particularly in the short term. A wellbeing programme must reflect culture.

Industry views

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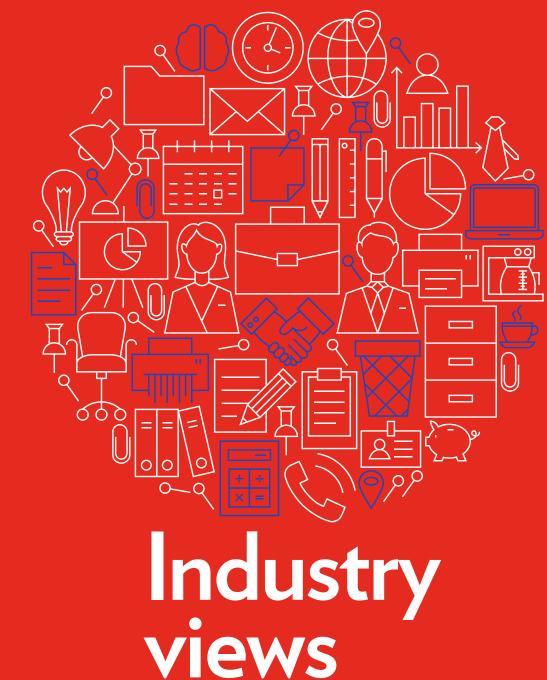


Learning from experience Elisabet Hardy at Thomson Reuters Elite advises adding some more automation to the business development mix

Examine the future Jo-Anne Pugh at **BPP** says the solicitors qualifying examination should spur a period of innovation in the legal training landscape

28 Call for assistants Lois Collins, account director for Mitie Document Management, on why your next big strategic hire could be a new type of assistant

Deal wth disaster 32 David Fazakerley, chief information officer at McMillan Williams Solicitors, on securing future growth with Converge TS





INDUSTRY INTERVIEW

Learning from experience

Elisabet Hardy, vice president, LES global product management and marketing, Thomson Reuters Elite, explains why automation is key to more efficient and profitable business development



aw firms are all in the business of serving their clients, but in a climate where the smart ones are laser-focused on delivering value for those

businesses as efficiently as possible, they also need to ensure the relationship can yield a profitable return.

"Firms are increasingly good at being very proactive to bring more value to the client's table – but how can they ensure new business is really good business for the firm?" says Elisabet Hardy, vice president, LES global product management and marketing at Thomson Reuters Elite. Although firms are pressed for time to make such decisions, it's vital to take a thoughtful approach as this is one of the most important recurring questions they must manage to answer.

Fortunately, strategic investment in the right technology can facilitate both the efficient delivery of legal work and analysis of its subsequent profitability – notably by removing human effort (and error) from the process.

"With technology today, you can amass many more critical pieces of information to achieve a much more holistic view of a client or prospect," says Hardy. "That's not just about the client as a business and their industry, but about previous work with them: how that work has been managed, with what success, and even whether the client has been a 'good client'."

An important client meeting – or panel pitch – used to need all that information turned into a big,

paper-heavy dossier, she says – if it was even available at all. "But when we're all pressed for time, that isn't remotely efficient. Today you can literally have client business insight at your fingertips – you don't even need to search for it – all wrapped up into a single, mobile view."

Taking contact

That's the thinking behind Thomson Reuters Elite's 3E Business Development (formerly Business Development Premier), which is part of the Elite Enterprise Business Management Solution. And it doesn't only surface opportune client data fast, and automatically. It also addresses a separate challenge faced by firms, which is effectively capturing the information about prospects in the first place, even just their names.

"Client relationship management – and by extension, the organisation – can only be as good as the data it contains," says Hardy. That seems clear – but firms might still be surprised by a couple of her statistics. For example, 70% of contacts in a database are out-of-date a mere year later – and 50% of a single employee's contacts probably aren't on the system at all. If you consider that each of those contacts might just have been turned into a marginally profitable piece of business, it's a huge avoidable loss.

"It's not just lawyers who are at fault – frankly, all of us can be very bad at keeping contact databases up-to-date," says Hardy. That includes recording brand new contacts after any form of

"Client relationship management – and by extension, the organisation – can only be as good as the data it contains."



"A firm may have a particularly tight pitch deadline against some big competition, for example, and so it needs a really powerful search across all the firm's data for the best possible fit."

encounter. "By the time you've returned to the office, logged on, and then been distracted by something else, you've forgotten about it. So, it never makes it into the system at all.

"At Thomson Reuters Elite, we prefer to take that manual work away from the humans, and allow the system to complete it more effectively instead."

How so? Under 3E Business Development sits Elite's data engine, which reduces data-entry work to "near zero," she says. "The power lies in the ability to search and gather contact intelligence from across an employee's daily activities, such as correspondence." It will identify things that occur in emails – for example, changes of address, or a sudden new, frequent contact – and update the system accordingly, automatically.

Good with experience

But as well as ensuring the data is there to be found, and found efficiently at any time, there's a third piece to the law firm profitability puzzle. Firms also need to ensure they're involving the right people from their increasingly dispersed and international operations – whether for the pitch event itself, to demonstrate competitiveness to prospects, or indeed for performing work costeffectively once won.

"Law firms' two most valuable assets are their relationships and experience," says Hardy. "That's what the business is built on – who knows who, and the work that you've done with specific or similar people in the past.

"A firm may have a particularly tight pitch deadline against some big competition, for example, and so it needs a really powerful search across all the firm's experience data for the best possible fit. It could search by past matters, type of law, practice, post code or seniority to put the



perfect team together." As just one specific example, she explains, the firm might wish to leverage a connection at a particular executive level with another client to demonstrate capabilities in a key area.

In 2018, 3E Business Development was named best law firm proposal automation and experience management solution by the National Law Journal in the US, for the second year in a row. "Some 15 years ago, we released the industry's very first experience management system, so we have accumulated quite a lot of learning about what works best, not least by working with our clients," says Hardy. Users today can, for example, not only uncover personal career information – from For more information, visit: www.elite.com

education to ongoing board positions – but can also gauge any particular relationship's cumulative and comparative strength.

Seize the data

Perhaps the real trick, however, was the integration of Elite's financial management datasets with all of the above, so profitability and client insight appear side by side – on demand.

"That helps you to determine whether the person you're about to speak to about future business is a profitable account today," says Hardy. And of course, you can calculate what that might mean for a negotiation. "Do they pay their bills on time, or do you have a lot outstanding? Should you really be pitching for another tranche of work at all?"

All good questions. On top of that, 3E Data Insights – a new product launched in late 2017 – combines a data warehouse with Microsoft Power BI to create richer visualisations of performance data by categories such as practice or region. This has begun with financial management data, but will expand to take on TRE Business Development soon, says Hardy, with data packs then released as frequently as possible.

Improved graphs are all well and good, but "most valuable is that you can then start to do more predictive analytics," she explains.

"For a very long time now, law firms have been largely focused on lagging or just-in-time indicators. Now they have an opportunity to use

"For a very long time now, law firms have been largely focused on lagging or just-in-time indicators. Now they have an opportunity to use historic trend data to forecast changes in individual or firm performance in six or 12 months' time." historic trend data to forecast changes in individual or firm performance in six or 12 months' time." And of course, they can potentially use that to model the impact of making management changes or process improvements, or introducing any new performance initiatives.

Cloud control

Also in late 2017, 3E Business Development became available in the cloud – a clear direction of travel that spans the Thomson Reuters Elite suite.

As with the firm's marketing process automation, part of the rationale for this is a reduction in – and simplification of – human workload. "The cost to law firms is one driver, but it's also easier for them to manage systems in the cloud," says Hardy. "It can be a struggle to process software updates as frequently as updates are made available today, but in a cloud application those updates are done for you. You can continuously get the value from your purchase a lot faster."

Moreover, Thomson Reuters Elite has placed its faith in the cloud not only for BD prospects, but also firms' financial management – a clear vote of confidence on the question of security. "Any law firm's investment would pale in comparison to the billions that a business like our partner Microsoft can invest in the security of its Azure data centres," says Hardy. But firms' appreciation of that fact has been a journey in itself.

"When we first started our cloud conversations with clients five years ago, almost nobody was interested," she says. "Today, some firms are saying they have a strategy for every system application to be in the cloud in just two years."

Perhaps that's partly guided by the climate surrounding information security risk in the wake of debacles such as the Panama and Paradise Papers leaks – "nobody wants to be tomorrow's front page," after all. However, Hardy says it's also a question of finding options that protect firms' profitability with a much more efficient delivery model. Introducing a level of business development automation and better predictive analytics is geared toward the same end – at the same time freeing the firm's people to focus more time and attention on nurturing those allimportant human networks. INDUSTRY ANALYSIS

Call for assistants



As firms embrace the flexibility, potential cost savings and engagement benefits of more agile working, they could go one step further and consider hiring a home-based PA, says Lois Collins, account director for Mitie Document Management

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very decade brings something new and cutting edge in workplace design and working practices. Cast your mind back, if you will – a few of

you may even remember the endless rows of single desks of the 1950s. Some will recall the cubiclestyle workstations of the 80s. And even if you were still at school all those years ago, you might recognise the office layouts from the films of the day (think Working Girl or The Secret of My Success).

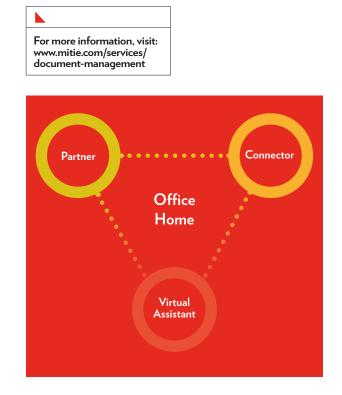
Today, the workplace is all about collaboration – creating the right environment for the kind of work you are doing – but also designed with at least one eye on employee engagement and work/ life balance. For example, soft seating, a quirkier decor and certain areas set aside for 'down time' – perhaps to play pool or foosball – can be the order of the day.

But for all the innovation in office design over the years, one key challenge for many businesses right now is space. How can you reduce your office footprint, or indeed increase the number of fee-earning staff you can fit into some of your most expensive city locations? Perhaps the most obvious answer is to put fewer non-fee-earning people in them.

Flex and the cities

Do your non-fee-earning support staff really need to occupy your valuable real estate all the time, or even at all? Could more flexible working practices capture new talent and provide a better work-life balance for those employees? Does this workforce even need to be located in the most expensive employment regions?

You could choose to hire a virtual assistant (VA). The VA is a PA, who is contracted to work from home supporting several managers, directors or partners at once. The VA may support a number of fee-earning staff based in many locations across the UK or even Europe. There's no need for them



to be based in London for them to support London partners and staff, or Manchester-based to support the equivalents in that city. They can literally be based absolutely anywhere.

Most activities VAs carry out can easily be managed remotely, and with smartphone technology they don't even need to be sitting at a desk in their living room. However, working from home does throw up some challenges when it comes to processing something physical. Naturally your VA can't pick up and deliver physical items if they're in another city. But that's not a problem. That's where your new 'connector' comes in.

Connector at work

The connector works in the office receiving and triaging all the physical work that the VAs need to make happen. The office services team then carries out the actual work, whether that is printing and delivering travel tickets or documents, sending couriers, or delivering IT peripherals. In fact, it could be anything that your fee-earning staff need to be physically brought, or have taken from them. Some of the best ideas are the most simple – and this is one of them.

Everybody happy

It's great for the virtual assistant. He or she isn't bound to a desk in their home. As long as they can connect to the internet, they can work anywhere supporting your fee-earning staff. The VA can enjoy a better work-life balance, with little need to spend time and money travelling, other than to visit your office occasionally to check in with colleagues.

But it's every bit as great for your business. You can tap into a much wider range of talent that comes from anywhere in the UK, engaging staff who would not previously have been available to you. You can achieve lower resource costs and, perhaps most importantly, you will free up your valuable real estate.



Examine the future

Jo-Anne Pugh, strategic director of programme design and development at BPP, says the SQE presents an opportunity to be bolder in the design of training programmes that are fitter for the needs of your future workforce

ou don't read many articles in the press that praise the new solicitors qualifying examination (SQE). Although much of the commentary

indicates the SQE is disliked by the legal profession, university law departments, and LPC providers, the recent decision of the Legal Services Board to give the green light for its implementation brings its reality ever closer. And of course, the SQE was always going to happen one way or another, as it is the end-point assessment for the solicitor apprenticeship, which has already launched. In spite of its many flaws, the introduction of the SQE might just be the impetus the profession needs to get the very best training for prospective new solicitors entering a brave new world of legal services delivery.

Some of us are old enough to remember the Law Society Finals (LSFs), where simply knowing and regurgitating procedural law was the key to exam success, followed by two years of articles before qualification. The 1990s ushered in new terminology with the introduction of the 'training contract' and a new programme of study, the legal practice course (LPC), with a focus on assessing skills like research, drafting, writing, interviewing and advising, and advocacy alongside core and elective knowledge areas. But that innovation was over 25 years ago. The skills and knowledge needed by solicitors in the 21st century look very different from those of the 1990s. This is in part why there has been so much disappointment and frustration with the SQE proposals. Its critics complain it is overly focused on the 'reserved' areas of practice, such as criminal law and wills and probate, carried out by relatively few practitioners, and that it dispenses with the need for study of wider and more specialised areas of law, particularly the range of corporate and commercial electives that leading law firms have come to expect their trainees to be versed in. Even the old LSF required the study of areas such as employment law and family law, making the SQE look very narrow indeed.

The key part of the SQE proposal, however, is to stop regulating programmes of study altogether.

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Instead, candidates will sit a series of centralised assessments, and these will be the gateway to qualification, with some loosely defined qualifying work experience sandwiched in the middle. Putting aside the many objections to all of this, not least the disruption it will cause to law firms' recruitment cycles, this means the end of current prescribed courses such as the graduate diploma in law (GDL), qualified lawyers transfer scheme (QLTS), professional skills course (PSC) and LPC. In spite of much fretting about cheap 'crammer' courses flooding the market in this bonfire of the regulated courses, what rises from the ashes is actually for the profession and innovative training providers to design.

Design with a difference

This is a massive opportunity. Without the regulatory shackles prescribing curriculum content and assessment methods it will now be possible to design programmes that genuinely prepare new entrants for current and future legal practice. By treating the SQE as the regulatory minimum, there is now a chance to redefine the knowledge and skills that are needed for modern legal professionals.

BPP recently held a number of focus groups across the country with a wide range of firms, in-house legal teams and other legal services providers. This followed on from its research in autumn 2017, which indicated that over threequarters of firms surveyed would be seeking training over and above the SQE minimum for their new entrants. The groups identified that new entrants to the profession still need much more For more information, visit: www.bpp.com

grounding in basic research, writing and drafting, but that these skills need to be taught and assessed in a realistic way to reflect the work of a 21st century lawyer.

Technology came up a great deal in the focus group discussions. There is a rise in trainees doing seats in innovation teams as part of the training contract, or qualifying into these new departments. Other firms have launched separate schemes altogether to recruit and train their future legal technologists. In spite of the misguided headlines about robot lawyers and calls for lawyers to 'code', there is actually a real skills gap here. Successful future lawyers will need to collaborate with technologists and technology – especially artificial intelligence applications, project managers, and other professionals.

Law was once about selling legal expertise. Nowadays it is increasingly about providing wider services supported by legal, technological, and process/project management. The successful future lawyer must therefore enter the marketplace with an understanding of how and why technology is disrupting the profession to be able to process map a transaction and apply design thinking to work with technologists and IT specialists to deliver legal services quicker, more effectively and with added value to the client.

New entrants to our profession deserve training that is fit for now and for the future. Neither the SOE nor the current LPC fits the bill. This is why additional modules and qualifications such as LLMs have been required to enhance the LPC in recent years. New training programmes and awards need to embrace digital as well as traditional skills, equipping law students to tackle realistic client problems and start on their journey to being a resilient and reflective practitioner. In fact, the new apprenticeship route to qualification offered by BPP ticks a lot of those boxes already, combining work-based learning, a reflective portfolio and practitioner-focused legal studies. At BPP we are designing our new programmes right now - there is no point waiting for more information about the SOE. Of course, our new programmes will meet the SQE regulatory minimum, but BPP and the many firms it works with are much more interested in defining the professional standards of the future.

Deal with disaster

David Fazakerley, chief information officer of high-growth regional high street firm McMillan Williams, explains why Converge Technology Specialists was by far the best bet when it came to better preparing the firm for the worst



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s business growth goes, McMillan Williams Solicitors has certainly had a pretty fair share. When chief information officer David Fazakerley

arrived less than five years ago, the business he took on had 10 offices and 160 staff. Today it has nearly tripled that – 28 offices, with a proportionate increase in revenue to £30m. Headcount, meanwhile, is nearly at the 500 mark.

But that pace of expansion also needs to be matched by the right investment in operational improvement and risk management. He says: "Over the years, we've invested a lot in technology that's scalable – and really fit for a £50m operation – and in particular, the resilience of our systems now needs to be higher than if we were still a smaller firm. We're now too big to fail." Similarly, the business can't afford long-term outages or disruption of continuity of service – which of course could well be a precursor to such a disastrous scenario.

"Even a primary data centre with plenty of backup is no longer enough," he explains. "We wanted at least two other options – a three-data centre strategy." One of these is a replica of the entire environment, with data replication every three hours and system recovery in four hours. "The operation now needs to be back up and running within hours, rather than days," he says. And the third pillar is a complete data repository in a virtualisation environment for daily backups.

Test of time

The firm had, in fact, already gone through a full review and selection process when it encountered Converge Technology Specialists (Converge TS) as a possibility for meeting these demands in 2017. Fazakerley discovered Converge TS was now a strategic alliance partner of Thomson Reuters Elite (McMillan Williams is a 3E and MatterSphere firm), and he decided to allow it to have a shot in the final hour.

"I particularly liked that they have such a strong and strategic legal focus and, to be honest, I was still a little uneasy about one or two points with the other suppliers. So, we gave Converge TS the specification and three days to complete it," he laughs. Not only did they successfully turn it around in the time, he says. It was both "fully costed and high quality."

But even this wasn't the factor that sealed the deal. Colleagues now headed over for a site visit. "There was instant rapport – they liked them as individuals, there was an appreciation for the technical expertise of the Converge TS team, we saw the due diligence and how they had worked with other clients, and it inspired real confidence," he says. "The key reason we chose Converge TS is definitely the people."

Save the data

At this point, things moved quickly – fortunately, this is a firm used to that. The centres went up in

Manchester and, after establishing connectivity, the failover testing process is now about to begin.

Alongside the quality of service (and at a fair price, says Fazakerley), and undiluted legal specialism, location was another factor.

"Regulation about what you can and can't do with data continues to change – most recently, of course, we have the GDPR coming into force," he says. "The Converge TS operations are all housed here in the UK, so there's no need to be concerned with any potential cross-border issues."

Regardless of regulation evolving to keep pace, however, cybercrime shows no sign of being beaten any time soon. "We know that professional services are being particularly targeted by criminals – and that means we need to take steps to protect our clients as well as ourselves," says Fazarkerley. The resilience built into the backup datacentres is as much to save our clients' data as it is to protect the firm's ability to provide a superior service with minimal disruption and delay.

He adds that, fast-growing or not, law firms are also arguably at greater risk as they pursue other strands of IT strategies, such as driving out efficiencies with process automation and pushing on with paper-light plans. All that digitisation means even more data to manage properly and protect from theft, loss, or loss of access.

On from disaster

Fortunately, now that Converge TS has a confident

foot in McMillan Williams' many doors, there is scope for the relationship to expand beyond disaster recovery into other key areas of support.

"We know that professional services are being particularly targeted by criminals – and that means we need to take steps to protect our clients as

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well as ourselves."

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"I suddenly have an extra specialist resource – they can be another good pair of eyes on what would be best practice. They're helpful and informative, and I'm happy for them to be an extension of the team."

For example, boasting a fully mobile legal workforce – MW fee earners all have huge flexibility, working out of any office in the network – Fazakerley is now implementing other solutions around two-factor authentication.

"Everything has been built with flexibility in mind, but also with security to match." He also plans to improve the backup provision within the primary data centre.

When all's said and done, he says, with a business like Converge TS supporting a business like his: "If you've done enough backups – and they haven't been hacked – yes, you can recover.

"How long that recovery takes is quite another question. In some cases we've heard of, the answer has been weeks, and when you're dealing with client information and court dates that could be enough to send a business over the edge.

"You need to be back in business not in weeks or days, but within hours and minutes – and with Converge TS providing our business continuity and disaster recovery, that's what we have at MW Solicitors."



Six of the best

Ways to better work

In July 2017, the Taylor review of modern working practices raised the notion of 'good work', as a route to tackling the triple challenge of improving equality, wellbeing and individual productivity in employment. Now the Chartered Institute of Personnel and Development (CIPD) has released the results of its first survey of "job quality" in the UK. It also has the following recommendations for employers who want to take practical action to reduce the number of employees who report being dissatisfied (18%) – or worse, regularly miserable (11%) – in the course of their work.

Offer clear pathways for progression. In particular, the CIPD says consider using apprenticeships and implementing mentoring schemes. Law firms have been strong adopters of both in recent years, including reversementoring to increase intergenerational understanding and connection.

Focus more on the design of jobs. This will help to ensure both that those pathways are indeed clear, and the best use of each employee's skills.

Ensure that all employees have a meaningful voice in the organisation. This can be through both individual and collective channels, and via formal and informal mechanisms, says the CIPD. Firms have leveraged collaboration technology, and most recently 'crowdsourced' innovation ideas to back. As well as employee forums, some other businesses have established 'shadow boards' to empower those earlier on in their career. What could your firm do?

Increase provision of flexible working practices. A huge number of law firms have launched 'agile working' since 2015 - more flexible than flexible working, in that, depending on the policy, people needn't follow a fixed alternative working pattern. Some permit one or two days a week of home working, some are even more fluid. Supported by the right technology, the practice has been found to be good for diversity, work-life balance, retention, and even productivity. But many add the caveat that feasibility depends on

both the role and client focus to some extent. What does it mean for business services?

5 Monitor workloads and deadlines to ensure people aren't feeling under excessive pressure. The arrival of resourcing managers in law firms in recent years comes as they try to improve fairness of work distribution to help people with their career progression – but it should also better manage the risk of burnout or other wellbeing problems surfacing.

6 Conduct a stress audit. And then direct resources to eliminate, or reduce, the main sources of stress at work. Perhaps treat this business issue as you would any other area of enterprise risk management and compliance.





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