

SEPTEMBER 2018

SUPPLEMENT INSIDE:  
TECH IN

# LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY  
MAGAZINE  
FOR LAW FIRM  
MANAGERS

SIX OF THE BEST

*Who's done the most  
to cut down carbon?*

LAW FIRM PROFILE

*Jon Walters, co-founder and  
partner at Northridge Law, on  
what it takes to set up shop*

EXPERT  
COLUMNISTS  
AND ADVICE  
FROM PRACTICE  
MANAGEMENT

## Table plans

*What are operational leaders at SME law  
firms doing to win partners' trust and get  
their voices heard at board level?*

BUSINESS INFORMATION FOR EVERYONE IN PRACTICE MANAGEMENT



E C L I P S E

Part of Capita Plc

# 25,000 people can't be wrong

Eclipse's Proclaim system is the solution of choice for 25,000 legal professionals in over 1,000 organisations. Proclaim encompasses Practice, Case and Matter Management, and is **the only system to be endorsed by the Law Society.**

From new start-ups to industry heavyweights, Proclaim is the system of choice for forward-thinking law firms.

- Fully integrated Practice Management Software solution
- End-to-end case and matter management workflow processes
- Ready-to-go workflows for specific practice areas
- SAR-compliant legal accounting
- Fast to implement, easy to use

Contact us for a demonstration

## 01274 704 100

Email: [info@eclipselegal.co.uk](mailto:info@eclipselegal.co.uk)

[www.eclipselegal.co.uk](http://www.eclipselegal.co.uk)

Endorsed by



The Law Society

# About us

LPM magazine is published by **Burlington Media**, a media and events business focused solely on people in legal business services and management – whatever size or type of legal services provider they work for.

We run LinkedIn groups with thousands of members, across several areas, from legal IT to legal process outsourcing. Find our LPM group at [bit.ly/lpmgroup](http://bit.ly/lpmgroup).

Our sister brand LSN's website is where you can find news, views and resources from the established legal news providers and hundreds of suppliers to the legal industry, all rolled into one useful information feed: [www.lsn.co.uk](http://www.lsn.co.uk)

Sign up for our weekly practice management e-newsletters, which bring you the best of our practice management content and our social feeds, every week:

[www.lsn.co.uk/subscribe/ezone](http://www.lsn.co.uk/subscribe/ezone)

We also run the popular **LPM conferences**, tailored for anyone working in management in SME law firms and ABSs. Our 2019 trip is almost ready to roll. Find out more about conferences here: [lpmmag.co.uk/lpm2019](http://lpmmag.co.uk/lpm2019)

ISSN 2398-9742

# LPM

LEGAL PRACTICE MANAGEMENT

ONE GREAT CONFERENCE  
THREE GREAT CITIES

**LONDON | BRISTOL | LEEDS**

THE ONLY EVENTS FOR SENIOR  
MANAGERS IN SME LAW FIRMS

"I FELT THE CONFERENCE WAS COMPLETELY BRILLIANT, VERY ENGAGING AND COMPLETELY RELEVANT TO THE CURRENT BUSINESS NEEDS OF MY FIRM. I SHALL BE DELIGHTED TO ATTEND NEXT YEAR AND WILL ENSURE MY DIARY IS FREE TO DO SO. THANK YOU ONCE AGAIN TO YOU AND YOUR TEAM FOR ORGANISING SUCH A GREAT EVENT."

Melanie Knight, practice manager, Humphries Kirk LLP

Conference partners:



**BOOK NOW**

[LPMMAG.CO.UK/LPM2019](http://LPMMAG.CO.UK/LPM2019)

CALL 0870 112 5058

EMAIL [EVENTS@LPMMAG.CO.UK](mailto:EVENTS@LPMMAG.CO.UK)

# Contact us



**Rupert Collins-White** is editor-in-chief of LPM magazine. He has written about the legal sector since 2005, before which he endured years as an IT hack until he tunnelled out with a plastic fork.

[rupertw@lpmmag.co.uk](mailto:rupertw@lpmmag.co.uk)



**Kayli Olson** is acting editor. A Kingston graduate, she has spent most of her time in the UK picking up British slang, playing board games, drinking bitter and showing us 'how it's done'.

[kaylio@lpmmag.co.uk](mailto:kaylio@lpmmag.co.uk)



**Andrew Muir** is LPM's editorial assistant. Straight out of Glasgow University, he used his skills in debate to smooth talk his way into the B2B world of work.

[andrewm@lpmmag.co.uk](mailto:andrewm@lpmmag.co.uk)



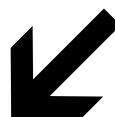
**Charlotte Bastiaanse** is a staff writer this issue. She snuck into the UK from South Africa on her Dutch passport – don't ask. She's also a beast at horse riding, and ready to let loose on legal.

[charlotteb@lpmmag.co.uk](mailto:charlotteb@lpmmag.co.uk)



**Emily Nash** is LPM's client services contact – and resident musician. Want to advertise in LPM magazine or feature in our awesome advertorial section? Then get in touch with her at:

[emilyn@lpmmag.co.uk](mailto:emilyn@lpmmag.co.uk)



**0870 112 5058 or [LPM@lpmmag.co.uk](mailto:LPM@lpmmag.co.uk)**

Burlington Media Group  
20 Mortlake High Street  
London SW14 8JN



**[www.lsn.co.uk/practice-management](http://www.lsn.co.uk/practice-management)**

Find practice management blogs, news, resources, white papers, case studies, video and audio and much more online



**@LPMmag**

We're listening, and we also have plenty to say. We love Twitter – and if you love Twitter too, share your thoughts with us



**[bit.ly/lpmgroup](http://bit.ly/lpmgroup)**

We run LinkedIn groups for thousands of people in legal business services, and we run a dedicated LPM group, too

# WELCOME

*Hope you're all fresh faced, not too sun kissed, and ready to get back into the swing of things.*

Welcome back to our regularly scheduled programme – hope you're all fresh faced, not too sun kissed, and ready to get back into the swing of things. What better way to get started than with some wise words about what it takes to smooth talk partners? Or if you're a less traditional firm, how you can properly influence leaders to set change in motion? It's definitely not easy, we heard (p33).

Beating another drum, p11 has some insight about what your clients are asking of your technology capabilities. Does this match what you're actually doing? It seems law firms often have the technology in place, but they're using it exclusively for internal purposes. What's that say about how well you listen to clients?

Our law firm profile this month (p38) features Northridge Law, the specialist sports firm that split from Charles Russell Speechlys in October 2017.

And finally, which SME firms are best at breaking down their carbon emissions? It's not just a thing for the big firms to be conscious of – we all live on this planet. Let's take care of it in every way we can, including in the office space (p46).

Kayli Olson, acting editor  
@LPMmag | [kaylio@lpmmag.co.uk](mailto:kaylio@lpmmag.co.uk)



## IN PRACTICE

**07 Your view:** Do firms need to be more involved in the mental health of their staff?

**09 LPM asks: Ed Fletcher** at **Fletchers Solicitors** talks workplace culture and leadership

**10 Book review: Ed Whittington** at **Moore Blatch** reads **The Churning**

**11 Data:** What are SME firms doing to modernise the way they work?

## COLUMNS

**13 Joanna Kingston-Davies** at **Jackson Lees** discusses concerns surrounding physical health

**15 Edward O'Rourke** at **Ashtons Legal** talks agile working approaches

**17 Martin Palmer** from **Pulsant** on improving your cybersecurity strategy

**18 Natasha Rawley** at **ADDS** has some advice for switching suppliers

**29 Janine Parker** from **Paragon** has a message from the insurance market

**31 Adrian Jones** at **Tikit** on innovating to support flexible working

## FEATURES

**33 Feature:** What are SME operational leaders doing to win partners' trust and earn their seat at board level?

**38 Law firm profile: Jon Walters** at **Northridge Law** talks setting up shop

## INDUSTRY VIEWS

**42 Jessica Brown** from **Thomson Reuters** breaks down horizon scanning for firms

**44 Johanan Tang** at **Euclid Law** explains how **Clio** supports the firm's growth and client strategy

## REAR VIEW

**46 Six of the best:** eco-inspiring SME firms

**21**  
**SUPPLEMENT**  
**INSIDE: TECH IN**



# IN PRACTICE

## SNAPSHOT OUT OF THE TIN CAN

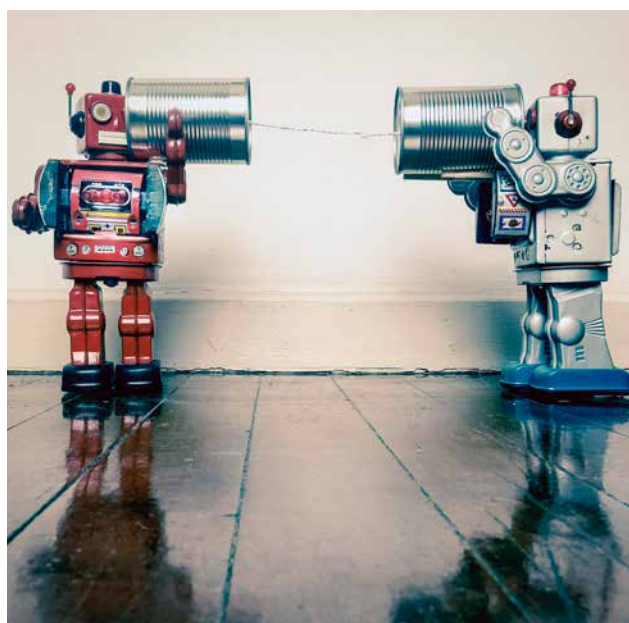
It's been a brilliantly hot summer, but sadly a seasonal change is certainly in the air. Although the weather is cooling down, reviews and regulations are heating things up in the legal sector this month.

**The Law Society launched a commission to investigate the advantages and disadvantages of introducing algorithms to the justice system.** Ex-COO at Cripps and newly appointed president of the Law Society, Christina Blacklaws, stated at the launch of the commission that big data and algorithms already augment human capabilities for analysis and prediction beyond anything previous generations could have imagined.

However, the Society's concerns remain centred on dangers and biases pertaining to ethical principles. An evidence session, led by Blacklaws, was presented to the Law Society of England and Wales Public Policy Commission by a panel of technology, government, commercial and human rights experts during late July 2018.

In other news, **Blacklaws has expressed concern surrounding deregulation of the solicitor profession and reduced consumer protection.** In a statement released by the Law Society, Blacklaws said: "The Solicitors Regulation Authority appears to be pursuing a deregulatory agenda based on flawed premises and at the expense of consumers. The misguided proposals now being considered by the oversight regulator fail the litmus tests for regulation: they jeopardise the public interest and risk weakening the rule of the law."

In other news, **former principal at personal injury firm Asons Solicitors, Kamran Akram, has received an 18-month suspension by the Solicitors Disciplinary Tribunal.** The Bolton-based firm was closed last year following an intervention by the SRA after the firm breached the SRA Principles 2011 and SRA Code of Conduct 2011.



The SRA will further determine any restrictions on Akram's practice in the future. It's been proven that Akram allowed Asons to give rise to a conflict of interest between the firm and its clients between 2013 and 2015 – one of eight allegations brought by the SRA, which is proved in full.

Lastly, the big news that has done its rounds over the past month is of course the announcement that **Big Four firm EY has acquired Riverview Law.** The acquisition is supported by EY's view to support increased efficiency, manage risk, improve service transparency and reduce costs of routine legal services. Riverview is known for its artificial intelligence platform Kim, which provides clients with a user-friendly gateway to legal support, although it's understood that this platform is separately owned and not part of the EY deal. [LPM](#)

✓ Have you got a story or report for us? Write to [lpm@lpmmag.co.uk](mailto:lpm@lpmmag.co.uk)

"Psst ... Have you heard the news about the robot down the road?"

IN NUMBERS

### Are you stressed?

Professional services workers are the worst in the UK for not doing anything to manage stress, followed by education and healthcare, a survey finds.

58%

of law and accountancy staff do nothing to relieve stress outside of work

78%

said it is lack of free time that's the biggest obstacle

1/10

said money is the reason post-work stress relieving activities aren't pursued

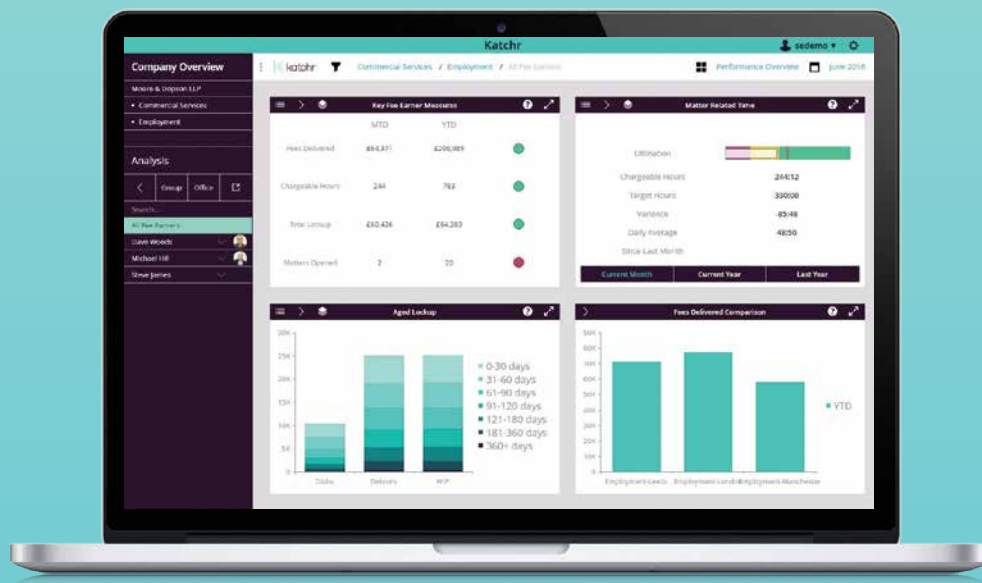
Source: Obby.co.uk survey of 1,015 working UK adults

“

Having the information  
available to make quick  
decisions is like a breath  
of fresh air.

”

## Business Intelligence software for law firms



Faster data.  
Better decisions.



View your KPIs in  
only one click.



Out of the box  
deployment.



Create your own  
dashboards.



[www.katchr.com](http://www.katchr.com)

**DAWN HILLMAN**  
HR MANAGER,  
DUTTON GREGORY  
SOLICITORS

Our employees are our biggest asset and we rely on having a healthy and productive workforce. Good workplace mental health is moving up the agenda, but I don't believe a formal mental health and wellbeing programme needs to exist to make a difference. Preventative initiatives to support a proactive approach should be put in place (such as regular catch-ups with managers, agile working, encouraging peer support, and training) but the key focus should be on developing a culture of awareness to encourage and support employees to talk openly about mental health.

**CLAIRE RICHARDSON**  
HR MANAGER, RAMSDENS

The short answer is no. Line managers play a crucial role – the way they manage and interact with their team has a direct impact on their wellbeing. Knowing your staff well enough to notice, and then acknowledge, when they aren't being themselves could be the early intervention that is needed. Most people respond well when given the opportunity and feel comfortable enough to talk, and sometimes too formal a process can inhibit this.

**MARTIN GLOVER**  
HR DIRECTOR,  
MORTON FRASER

Absolutely. The health and wellbeing of our people is core to who we are as a firm and it is firmly embedded as part of our culture. Helping our staff to be the best version of themselves is a key tenet of our annual wellbeing programme, which takes a holistic view of health. The programme provides support and events for the whole firm, covering emotional, physical, financial, nutritional, musculoskeletal, and other aspects of health and wellbeing.



*As mental health support becomes more prominent and expected in the SME legal sector, we ask:*

*“Do law firms need to have a formal mental health and wellbeing programme in place to be more actively involved in the health of their staff?”*



Follow LPM on Twitter  
**@LPMmag**

Want to write us a letter? You know, that thing no one does anymore? You can email us a letter for publication to [lpm@lpmmag.co.uk](mailto:lpm@lpmmag.co.uk), or post us something to: LPM magazine, 20 Mortlake High Street, London, SW14 8JN. Or get in touch through our LinkedIn group at [bit.ly/lpmgroup](https://bit.ly/lpmgroup)

**SUE EVE**  
HR DIRECTOR,  
BATES WELLS BRAITHWAITE

One in four people will experience some mental health difficulties in their lifetime, which means no firm is immune. Unfortunately, mental health presents in ways that physical health doesn't and is often disguised by employees. The great firms are those who find ways to spot early signs of someone in distress and provide appropriate and sensitive support. Companies are getting better at early identification and it is only through open and clear programmes that firms can be even better at helping people be resourceful and proactive around their wellbeing. Such programmes can tackle the 'prevention' as well as the 'cure'.

**CATHERINE DEAN**  
HR DIRECTOR AND PARTNER,  
ATTWATERS JAMESON HILL

The important thing is not whether there is a formal policy or programme in place, but whether there is a commitment to positive mental health and wellbeing. Employers should do their bit to eliminate the stigma around mental health and promote an open and supportive environment, not only because we have a duty of care, but because it makes good business sense. A healthy, happy workforce is a productive workforce starting out.

**NADIA BILES DAVIES**  
HR DIRECTOR,  
RAYDEN SOLICITORS

I don't think a formal mental health and wellbeing programme is necessary. However, it is essential that any wellbeing agenda is considered at every staff touchpoint and is embedded within the company culture and working environment. A starting point would be to ensure that every office has a trained mental health first-aider. More importantly, firms should also focus on effectively communicating to all staff their priorities for mental health, together with the available support. It's also the responsibility of senior leadership teams to lead from the front and demonstrate healthy working practices.

**Do you need a next day delivery that's guaranteed?**

**Your documents are sensitive, urgent and business critical. Our tracked services provide delivery reports, online tracking in real-time, and with next-day delivery by 9am as standard.**

For more information email [exchange@thedx.co.uk](mailto:exchange@thedx.co.uk) or visit [dxdelivery.com/exchange](https://dxdelivery.com/exchange)





Excellence through experience



# Providing IT and telephony solutions to law firms for 30 years



- Bespoke managed services
- Extensive legal software knowledge
- On-premise, cloud and hybrid solutions
- Microsoft cloud platform specialists
- GDPR and data security
- Hosted VoIP and Unified Communications

TELEPHONE 0333 222 4334

EMAIL [enquiries@quiss.co.uk](mailto:enquiries@quiss.co.uk)

[www.quiss.co.uk](http://www.quiss.co.uk)

## QUISS CAN HELP

 **works**  
Bespoke managed services

 **cloud**  
Hosting platform solutions

 **voice**  
Converged telephony

 **share**  
Business productivity solutions





# LEAD TO CHANGE

Ed Fletcher, CEO at Fletchers Solicitors, discusses workplace culture, introducing new structures and what it means to be a leader

**Q** How has the Fletchers model changed and why?

**A** The change in mindset started when we incorporated as a limited company. We were one of the first law firms to do that back in 2007, and since then it's been a steady evolution in the way we're structured, the way we act, and the way we think. I think the corporate structure has helped hugely. We compartmentalised, brought in specialist non-lawyers and introduced industry-leading processes and structures from other business sectors, which has been really powerful for us.

**Q** How does your model offer a more flexible work style and differ from traditional models?

**A** We offer team members the opportunity to accrue hours when they work in excess of their

contracted hours, and then take that time back however they want. People can also choose how much time they spend in the office because we value the outcomes, rather than the inputs. This enables our team members to use time more effectively for things they want to do outside work, which is really healthy. On occasion it can be challenging to manage and ensure we meet targets, but most people understand that the flexibility works both ways. We try and build adult relationships in that respect, and if you treat one another like this you develop a system that benefits both the organisation and the individual.

**Q** What is the most important factor in cultivating a positive working culture?

**A** Being open, transparent and true to our values is the

absolute key to it all. We've put many systems and processes in place over the years to try and incorporate this way of thinking into our corporate DNA, but the biggest thing in driving positive cultural change is simply being radically honest. Even if it's bad news, if you're open with everyone, and they see that, we can all come together to find a better solution.

**Q** What's most important in a law firm leader?

**A** Injecting energy, providing direction and giving hope. I've been on countless courses and I've been in a leadership position for the better part of 20 years – but, real, great, adaptive leadership is down to those three things. If you're providing them you're doing quite a lot of things correctly as a leader. That hope is all tied in with being able to paint

a picture of a bright future, which everyone can feel like they want to be part of and contribute towards.

**Q** What is the most effective policy you have introduced into the firm?

**A** Last year we completely overhauled our business planning and performance management processes. That has ensured that all our team members receive objectives that contribute towards a company meeting its agreed target. So, we now review performance and gauge these targets on a monthly basis, giving us a real, clear focus on what needs to be done. It's been a massive improvement to the more traditional appraisal format. It's more relevant and tied to the goals of the organisation, and the professional goals of the individuals as well. **LPM**

**brother**  
at your side

## Digitise your case documents with ease

Professional Scanning Solution

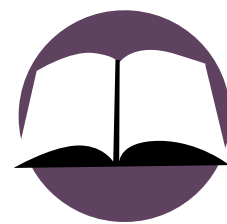
Designed specifically for Law firms, Post Partner can significantly reduce your weekly scanning time through bulk scanning of hard copy documents. Files can be scanned and saved directly to the correct location within your case management system with ease. This solution also assists with secure data handling, assists remote working and heavily reduces archiving costs.

To find out more, visit  
[www.brother.co.uk/scan-legal](http://www.brother.co.uk/scan-legal)



ADS-3600W





## BOOK REVIEW

# HELP YOURSELF

Edward Whittington, managing partner at Moore Blatch, says *The Churning* is full of learning to help you change your leadership style

The origin of the self-help movement dates back to 1859 and the publication of a book by Scottish government reformer Samuel Smiles, entitled *Self-help*. Encouraging readers to turn away from materialism and towards knowledge, the book was a success and the genre is still popular today.

Traditionally though, self-help books often polarise opinion. When commenting on *How to Win Friends and Influence People*, Warren Buffet is quoted as saying "it changed my life". But equally, many commentators treat the market with some cynicism, or even derision.

Whatever your stance, you can't argue with the fact that the self-help book industry is highly successful. It is reportedly worth \$9.9bn in the US and, while there are no stats for the UK, you need only look in your local book shop to see its popularity.

From a business perspective, the power of self-help is widely recognised and used by many industries. Activities or exercises that don't directly relate to the business, but which support team bonding and improving an individual's understanding of themselves and others, can not only boost performance, but also make a company a more attractive place to work.

Additionally, look at the most popular TED talks of all time. The first is about the importance of creativity in education, the second about how our body language affects who we are. The third gives an insight into the model for inspirational leadership, clocking up a staggering 40 million views.

It's the topic of leadership that Finn Jackson's *The Churning* covers. In contrast to most self-help books, Jackson's book is a workbook, full of exercises for those who want to "build inspiration in times of change".

This theme of this really is the key to the book as Jackson argues that the skills required in times of change are different from those required when a business is stable.

That change has been immense. Since the first edition was published in 2016, Jackson himself points out that North Korea has emerged as a long-range nuclear power, the #MeToo movement has swept the world, and two of the world's leading G7 countries have become significantly more unstable.



*The Churning* by Finn Jackson, volume one, second edition

**Publisher:** Hertford Street Press  
**Publication:** March 2018  
**Price:** £19.99 (paperback)



*Reviewer: Edward Whittington, managing partner, Moore Blatch*

The pace of change today is so rapid that being able to evolve and adapt is essential – as is inspiring employees to join you on that journey. An ability to adapt to change successfully is a necessary part of any successful business model.

Business leaders also now find themselves working in an environment where legislation changes fast, while emergence of disruptive technologies are changing the way we work.

We're seeing a big shift in working practices. With the future ever harder to predict, it may make more sense to focus on our ability to embrace and manage change, as opposed to dealing with every new development as it occurs. To be a success, keeping up isn't enough – to be competitive you must be one step ahead of the rest.

And leadership isn't just about those at the top – good leaders are required at every level of an organisation, as are 'leaders in the making', to ensure strong succession planning. This book will appeal not only to those already in leadership roles, but also to anyone interested in building and developing their personal leadership qualities.

This book shouldn't be picked up lightly – it requires considerable input from the reader. Jackson himself is a successful coach, working with organisations of all sizes – from startups to multinationals.

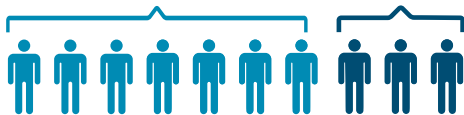
For those unable to engage Jackson directly, this book is probably the next best thing to enjoy the benefit of his insights, experience and coaching abilities to help develop and polish your leadership style. **LPM**

# DIGITAL FAILURES

LPM has been following the courts digitisation story since its inception. Clients are asking for modernisation of the justice system but what are law firms doing?

A UK study on 1,000 consumers and 500 law firms by Olive Communications 2018 finds:

## WHAT CLIENTS WANT



7 out of 10 clients would choose a lawbot (customer-facing, automated online system) to handle their legal affairs over a human lawyer

**56%** are even prepared to pay more for such a service if it means a faster resolution

### Most wanted services

**46%**

insurance claims

**23%**

financial disputes

**56%**

tax appeals

## HOW LAW FIRMS FEEL



**Web conferencing** – 39% of UK law firms use web conferencing internally but less than a quarter (23%) are using this facility for liaising with clients



**Chat** – 41% are embracing chat in-house with an almost equal uptake among SMEs (37%) as larger firms (45%). Only 7% overall are using chat when communicating with clients



**Instant messaging** – 28% of law firms are using IM peer-to-peer but less than half of these (10%) use it to engage with clients



**Cloud file sharing** – 76% of SMEs and 81% of large law firms use cloud file sharing platforms to access and exchange documentation but just 1 in 5 are using these systems to share papers with clients

**SPROUT IT**  
LEGAL IT SPECIALISTS

HIGH QUALITY  
IT SUPPORT,  
CLOUD &  
CONSULTANCY  
FOR THE LEGAL  
INDUSTRY.

## IT SOLUTIONS DESIGNED FOR LEGAL



### CYBER RESILIENCE

Our expert approach to Cyber Resilience will defend you against the ever-evolving world of cyber threats. Our cybersecurity services and the latest technology will keep you safe.



### PRIVATE CLOUD

Dedicated to the UK Legal Sector, the SproutCloud® provides managed IT services delivered with a specific focus on security and compliance, from a trusted market leader.



### IT CONSULTANCY

Bespoke, support, consultancy and strategy, tailored to suit your business. Whatever your business challenges and goals, we have the skills to meet and exceed them.



# LPM

LEGAL PRACTICE MANAGEMENT

SPECIAL READER OFFER

**OFFER:  
5% OFF  
YOUR FIRM'S  
FIRST YEAR OF  
TRANSCRIPTION**

SIGN UP ONLINE  
OR QUOTE  
**LPM2016**  
WHEN CALLING

## CUT COSTS, INCREASE EFFICIENCY

All firms could benefit from outsourcing transcription to dictate2us – but even more so with our **LPM** deal: **5% off your first year**

“d2u is the UK’s number one outsourced transcription service for medical and legal professionals and highly competitive all over the world. We pride ourselves on saving our clients time and money, as well as offering state-of-the-art security and a first-rate service.”

*Daryl Leigh, CEO, dictate2us*

# LPM

LEGAL PRACTICE MANAGEMENT

LPM magazine has agreed a special deal for its readers with dictate2us – 5% off your monthly transcription bill for one year if you sign up through the dedicated **LPM** link, or call and quote **LPM2016** when signing up. You can trial the service for free before committing.

### Use d2u and enjoy the benefits of:

- Fast turnaround times
- Secure and confidential service
- Secetarial cost reductions of up to 60%
- Guaranteed 98.5% minimum accuracy
- iPhone, Android and Blackberry apps with one-hour turnaround
- 100% output - only pay for the time you talk
- Free, no obligation trial



The d2u Transcriber app is free to download from Apple and Android app stores and BlackBerry App World

[www.dictate2us.com/lpm](http://www.dictate2us.com/lpm)



*This special LPM magazine reader deal only relates to customers that execute an agreement for a minimum term of 12 months with a minimum monthly commitment of 500 minutes. LPM magazine sought two law firm references for dictate2us to verify its claims for quality and delivery. The 5% deal only applies to the first paying year the customer is with dictate2us. LPM magazine is not responsible or liable in any way for work done by dictate2us and is an advertising referrer only.*



# LET'S GET PHYSICAL

JOANNA KINGSTON-DAVIES, GROUP CHIEF OPERATING OFFICER

It's about time we talked about our physical health and our approach to it. Are we doing enough to help employees affected by health complications and taking preventative steps to cultivate a healthy workforce?

National statistics on cancer and fertility alone offer us a startling wake-up call.

According to Cancer Research UK, there are more than 360,000 new cancer cases every year in the UK – that's nearly 990 cases a day, or one new diagnosis every two minutes.

Research from the Human Fertilisation and Embryology Authority tells of over 68,000 IVF treatments in 2016. That's the equivalent of over 186 treatments per day, or one treatment every seven or eight minutes. Fertility problems are estimated to affect around one in six or seven couples in the UK – approximately 3.5 million people.

Cancer and fertility are but two examples from a wide range of issues that can affect anyone. Therefore, we can assume that a large proportion of our workforces are directly affected by very real health issues. Importantly, however, we have the ability to control how we handle these cases.

While some companies offer fantastic health provisions, many businesses will maintain staff pay for the first few days of absence, before tipping over to statutory sick pay, and then ultimately no pay at all. Is this not the wrong way around?

People need the most help when they have a serious illness that requires longer time out of the office, rather than a heavy cold or sickness bug that only needs a couple of days. The implementation of serious illness and fertility treatment policies can give your workforce huge peace of mind and demonstrates commitment to wellbeing. The fear of being left without income because of a medical issue is a massive burden to bear – job and income security should be the last thing on our minds at times of illness.

While we all need the odd day off to get over a bug when we are really suffering, paying people for the occasional absence here and there can also be an easy way to get an extra few days' holiday for those whose work ethic allows it.

Many law firms organise medicals for their staff when it becomes a business risk not to do so – usually at partnership admission level.

But how much time is actually invested into staff health and wellbeing for everyone (not just the most senior employees) before it becomes a business requirement and risk mitigation exercise?

Someone once said to me that if you're not naturally inclined to exercise, the only way to do it regularly and consistently is to build it into your routine. You need to make an appointment (no less important than any other meeting) with yourself every day to do it. Otherwise, it just slips. How many of us actually encourage our people to take time to look after themselves proactively, rather than reactively?

One of the key issues we continue to hear from lawyers is that they just don't have the time to exercise properly. However, the lack of exercise just adds to stress and anxiety and doesn't allow people to turn off properly.

Bigger organisations build gyms, yoga and mindfulness into what they offer their people – but how many people genuinely switch off and have a proper break by using these services? Are these really enough of a physical and mental break?

Is it time for us to start completely revamping our health-related policies to truly make time for our people to look after themselves before they get hit with an illness or condition that takes them away from work?

A report by the Centre for Economic and Business Research, commissioned by FirstCare in 2017, stated that the cost of sickness-related absence to the UK economy was £18bn in lost productivity. The benefits of a healthy workforce are huge commercially but, more importantly, enable the wellbeing of our people. **LPM**



## ABOUT

Joanna Kingston-Davies,  
COO  
Jackson Lees  
[www.jacksonlees.co.uk](http://www.jacksonlees.co.uk)



**Jackson Lees**

**Revenue: £12m**

**Corporate status:**  
**Limited company**

**126 fee earners, 265 total staff**

**Offices: Liverpool,  
Manchester, Birkenhead,  
Heswall, West Kirby**

# The best-run law firms choose Clio.

“

Clio lets us transport our practice and work wherever we like, whether that's at home, on the client's premises, or in the boardroom. It's great to have that flexibility.

– Emma Reid,  
Director and Solicitor, Ergo Law



Clio offers all you need to run a law practice from intake to invoice, with powerful tools to manage cases, clients, documents, calendars, time tracking, reporting, and accounting.

**Sign up for a free trial today at [clio.com/uk](https://clio.com/uk)**  
**Call us +44-800-433-2546 to schedule a demo!**



As an approved supplier of the The Law Society of Scotland, Clio is happy to offer 15% lifetime discount to Law Society members

# FLEXIBLE FUTURE

EDWARD O'ROURKE, CEO

In an article published in The Law Society Gazette in July 2018, it was claimed that autonomous working is still a pipe dream. The article observed that for an organisation to be truly flexible, its employees need to be trusted to manage their own working hours and arrangements.

This is something we have been grappling with too, but I am hopeful that the pipe dream is not too far away for the staff at Ashtons Legal.

The challenge for all business centres is trusting employees to manage their own hours. Some businesses have a long way to go to get to this position. The old habit of clock-watching (an obsessive habit of measuring value in terms of time, reinforced by legal businesses – another debate) is still prevalent in many businesses. Phrases such as 'What time do you call this?' or 'Part-time today?', while maybe said in a light-hearted tone, emphasise the underlying culture that you demonstrate your value to the business through presentism.

At Ashtons Legal, we have come to the conclusion that many flexible or agile working policies are just not flexible or agile enough. For example, many retain the notion of core hours, and thus prescribe a 'when' and 'where' employees must be at certain times, which revisits the idea that your presence is what really counts. This can confuse presentism with productivity.

I would ask you to consider how often you have sat at a desk feeling tired, knowing that if you had a break or called it a day, and got a good night's rest, you would be far more productive later or the following day. Would we not be far better off focusing on productivity measures and not on hours present at the office?

As technology continues to intrude on our lives, we have already lost grip of the nine to five. I am sitting here typing this over a weekend, and I've already responded to a number of emails from colleagues who, using their mobile technology, have also been working. These days, we have an ability to dip in and out of work more flexibly than ever before.

At Ashtons Legal we have reviewed a number of policies, such as ROWE (results-only working environment), and debated its pros and cons. We also looked at more philosophical approaches, such as that extolled by Ricardo Semler in The Seven-Day Weekend. However, we felt that these policies were not without their own issues, and thus have designed our own policy, which we will be trialling imminently.

So why am I confident we are closer to the pipe dream than other businesses? Our starting point was showing our trust in our employees to manage their own time. In 2015, we introduced a paid time-off policy for our employees – one that is prevalent in other sectors, but less so in legal. In essence, take off as much time as you need and we will pay you for it (all still need to take off the statutory minimum number of days). Although the policy received some criticism from external commentators, we continue to receive great feedback from our staff. It's part of our philosophy to treat all our staff like adults – too many old HR policies look to police behaviour as though all staff are delinquents.

Our challenge now is the continual cultural change programme – some habits are hardwired into some people – investing in IT solutions that best fit an agile way of working, and identifying what measures best correlate to productivity as opposed to hours sitting at a desk. **LPM**

**“** *The challenge for all businesses is trusting employees to manage their own hours. Some businesses have a long way to go to get to this position.* **”**



## ABOUT

Edward O'Rourke  
CEO  
Ashtons Legal  
[www.ashtonslegal.co.uk](http://www.ashtonslegal.co.uk)

**Ashtons**  
LEGAL

**Revenue: £19.5m**

**Corporate status: Partnership**

**195 fee earners, 360 total staff**

**Offices: Cambridge, Norwich, Bury St Edmunds, Thetford, Ipswich**





# Do you need a next day delivery that's guaranteed?

**Your documents are sensitive,  
urgent and business critical.**  
Our tracked services provide  
delivery reports, online tracking  
in real-time, and with next-day  
delivery by 9am as standard.

For more information  
email [exchange@thedx.co.uk](mailto:exchange@thedx.co.uk)  
or visit [dxdelivery.com/exchange](http://dxdelivery.com/exchange)





# DEFENSIVE POSITIONS

MARTIN PALMER, THE CLOUD EXPERT

Law firms make attractive targets for cybercriminals. There is a wealth of confidential and commercially sensitive information sitting on the company network and exchanged by email that makes firms vulnerable to attack. While most cyberattacks are opportunistic, such valuable data does increase the risk of a breach.

PwC's latest annual law firm report highlights something startling. According to last year's research, 73% of law firms in the UK suffered a security breach in 2016. Yes, this issue is a serious one.

Apart from the damage to your reputation (and your bottom line) there are wider regulatory issues to consider. I have to mention GDPR here as one of the most obvious, but it goes beyond that.

It's also true that while the threat is growing and ever-present, it's not all doom and gloom. There are ways to protect your business, your employees and your clients, and effectively to mitigate the risk of an attack.

The tricky part is knowing where to start. You know that you need a layered cybersecurity strategy and the supporting solutions in place – ones that look after your network, your applications and your staff. But with so many vendors and products on the market, it's not always as simple as it needs to be – especially if you're charged with keeping your own data safe as well as that of your clients.

As with any problem, it helps to understand the threat landscape and what you're dealing with. You need to remember that no matter how good your strategy and solutions, no organisation is 100% immune. What this means is that your firm needs to be in a position where it can carry on operating during and after an attack. And this is where a business-continuity plan comes into play as part of your wider cybersecurity strategy.

Ideally, your business should adopt a risk-based approach. By knowing your business extremely well, understanding your attack surface, defences, and where the gaps lie, you can prioritise your risks around the three key areas of technology, people and processes.

It's also not just about the here and now. Cyberattackers and their methods are evolving rapidly, driven by advances in technology. In the future, the bulk of threats is likely to come from mobile phones (attacks on smartphones will give hackers easy access to work information), AI, machine learning and internet of things, which will transform the threat landscape even more.

Daunting? Yes. But impossible to deal with? Not at all. While you may not have the right skills in-house to deal with it all, there are various solutions on the market that can help, as well as experienced security providers that can add the resources and expertise you need.

It's a lot to manage but it's critical for the health of your business. As long as you recognise the threat and the fact that your firm is a likely target, you can put the right plan in place for the risk to be mitigated, thereby helping you to protect yourself and your clients. **LPM**

**“** *By knowing your business extremely well, understanding your attack surface and where the gaps lie, you can prioritise your risks around the three key areas of technology, people and processes.* **”**



## ABOUT

Pulsant  
Enterprise class  
cloud computing  
Contact Martin on:  
0333 270 5989  
[www.pulsant.com](http://www.pulsant.com)  
[@PulsantUK](https://twitter.com/PulsantUK)



# BUY-IN FROM ABOVE

NATASHA RAWLEY, THE FILE QUEEN



“ *The recommendations for change were backed up with a warning of the dangers to process, compliance, business interruption and GDPR if no action was taken.* ”

Can you believe how amazing our scorcher of a summer has been, LPM readers?

Now that the September issue of LPM is hitting the desks, it's back to work! We tend to find that so many projects get put on pause prior to the summer break.

One of the biggest challenges we find with implementing projects is getting buy-in and sign-off from the managing partners. When you have an issue or pain that needs to be resolved (causing you headaches every day), how do you convince managers at top level that you need change?

Recently, we have been helping a practice manager with exactly this issue. The pain was due to the firm's current offsite record storage provider, with files not being delivered on time and no control at the legal practice level because of the absence of an online inventory system. The supplier was unwilling to work with the practice to move toward a paper-light office as orders had to be consistently chased. When a full file audit was requested they were told it would take a year to complete, and file destruction schedule reports couldn't be produced.

The practice manager was at her wits' end. Not only had she been dealing with a troublesome supplier, but the fee earners were venting their frustrations to her about the lack of control and accountability over the archive process – none of which was her fault.

When the practice manager first approached the file queen for a free-of-charge consultation, she made it clear that one of the greater challenges would be convincing the managing partner to change supplier. As it had worked with them since the practice opening and it had been the managing partner's decision to use

them, it was the firm's preferred supplier.

So, here's how we helped. First, we ran a full records management audit, documenting the whole process from start to finish and making recommendations for change. We triaged the recommendations for change just like A&E – red for immediate action, orange for immediate second stage implementation, yellow for less urgent, and green for non-urgent. This led to a single process-change document that could be presented to the managing partner efficiently and clearly in very quick time.

We made sure the recommendations for change were backed up with a warning of the dangers to process, compliance, business interruption and GDPR if no action was taken by giving examples of consequences relating to the day-to-day operations, finances and reputation.

Then, the ADDS supplier feedback form was distributed across the firm to everyone who was impacted by the service levels and processes from their current provider. The ADDS team designed this supplier feedback form some time ago, both for our continuous commitment to quality and also for projects such as these. If you would like a copy, please go to [www.archivestorage.net/tools](http://www.archivestorage.net/tools).

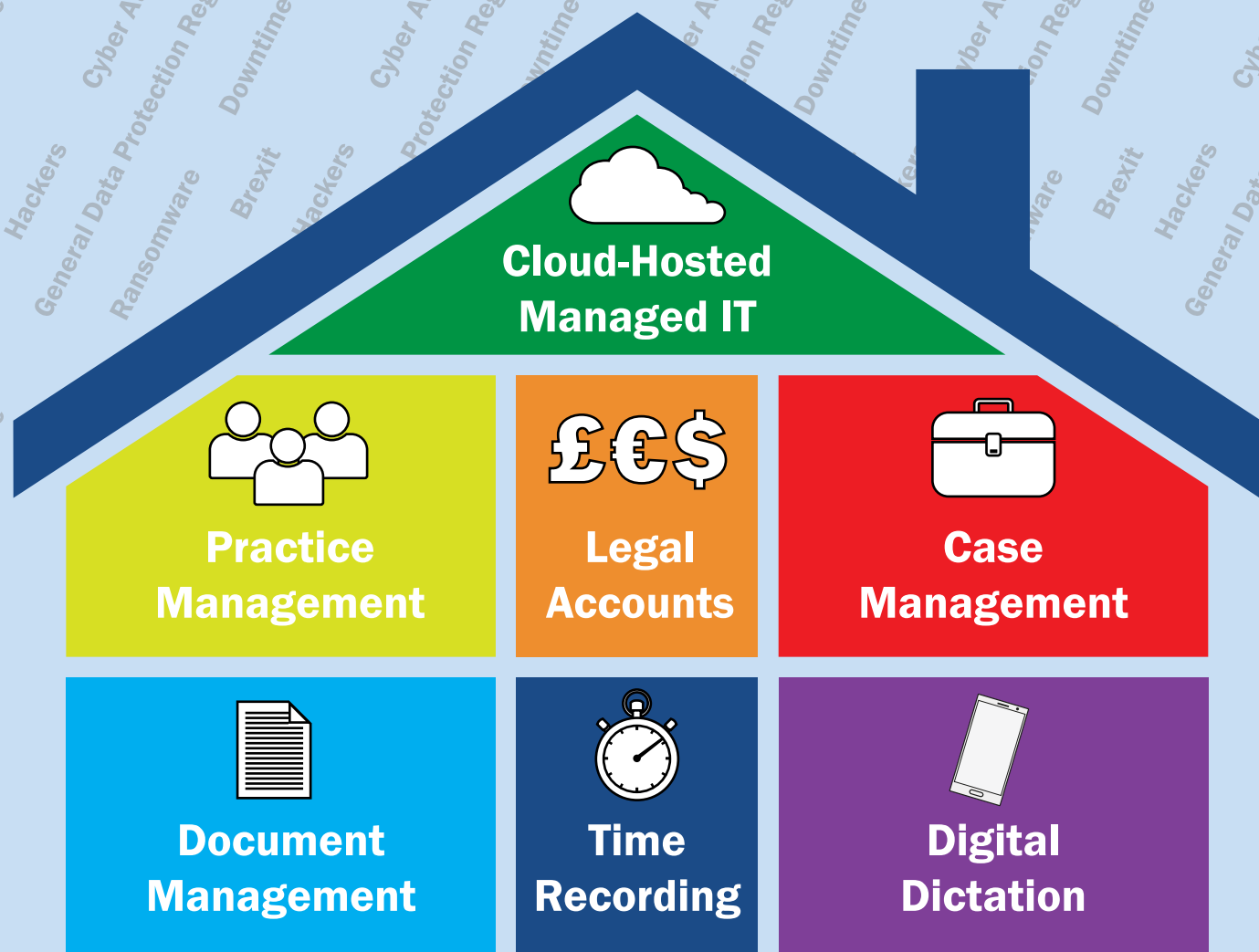
Even though it took time to distribute this form and gather feedback, it was crystal clear that the supplier was causing challenges across the firm and the results could then be presented to the managing partner.

The approach of having external feedback and support when trying to change an internal process can have a huge impact. This, backed up with written feedback results from across the firm, made the managing partner sit up, listen and implement change. It was clear for the managing partner to see that it was the whole firm, not just the practice manager, experiencing issues with the supplier, along with the dangers that faced the firm if they decided to let this continue. **LPM**

## ABOUT

ADDS  
Saving firms from  
paper hell  
Contact Natasha on:  
0800 328 0272  
[www.archivestorage.net](http://www.archivestorage.net)  
[@filequeenadds](https://twitter.com/filequeenadds)





# ALL OF YOUR LEGAL TECHNOLOGY NEEDS UNDER ONE ROOF

If you need software, odds are we can provide it.

With over 30 years' experience developing software for law firms, DPS now offer a full suite of products to meet all of your needs.

With round-the-clock support, extensive training and market-leading software, speaking to us will be the first step on an amazing journey to improving your firm's productivity.

[www.dpssoftware.co.uk](http://www.dpssoftware.co.uk)  
**0208 804 1022**

**dps software**  
The Legal Technology Experts





# More enquiries 24/7 brilliant service Happy clients

**When Moneypenny looks after  
your calls and chats.**

---

Over 950 law firms use us because we offer the very best people and technology to deliver the most efficient and satisfying experience for clients. Discover how we will make your firm even more successful. Talk to us today.

---

Hayley, Moneypenny Receptionist.



SUPPLEMENT SEPTEMBER 2018

# LPM

LEGAL PRACTICE MANAGEMENT

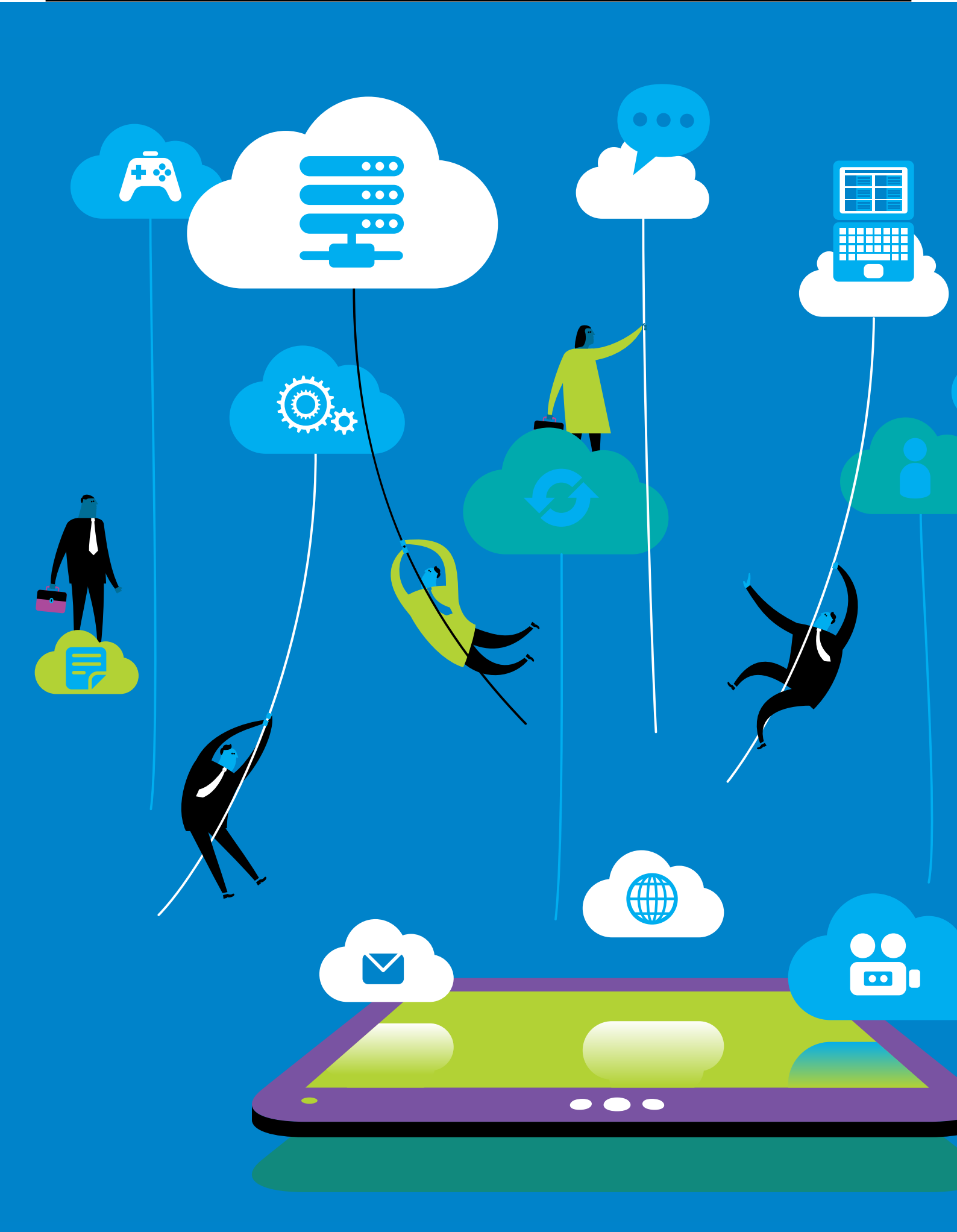


## TECH IN

*Clients increasingly expect better connections with technology.  
How can your firm leverage this opportunity?*

Sponsored by:

converge  
TECHNOLOGY SPECIALISTS



# GREAT MIGRATION



Michael McGuire, head of IT at Metamorph Law, explains how Converge Technology Specialists supports its growth and strategy and shares top tips for other firms on the same journey

**M**etamorph Law has enjoyed significant growth in its first two years of business life – with everything up, from acquisitions and geographic expansion to headcount.

The firm focuses on acquiring and merging with high-street law firms that concentrate on private client work, in England and Wales.

Michael McGuire, head of IT at Metamorph Law, knows how important it is to have IT that supports growth and strategy, especially if you're in the business of adding new firms to the family. In just under two years, the firm's overall headcount is up to 435 from 130. And there are no signs of slowing down as the firm aims to triple its number of staff in the next few years.

"The call for a unified platform became louder with each acquisition Metamorph made," says McGuire. "Converge Technology Specialists has come with us on that journey and we're now working toward the goals we've had in mind for quite some time."

## ALL HANDS ON DECK

The drive to use Converge TS stemmed from a relationship that had already existed with Linder Myers Solicitors since 2012. McGuire explains that Converge TS had already successfully managed big projects and migrations at this firm, and feels confident in the collaborative plans developed with Metamorph. After Metamorph acquired Linder Myers as its first firm in May 2016, McGuire was appointed as head of IT, and the relationship with Converge TS continued.

Metamorph then acquired BPL Solicitors in October 2017, but McGuire says that this element of the group is a self-contained firm with its own case management system (CMS), which was developed specifically for conveyancing.

While there was a strategy to move any

newly acquired firms onto one CMS, he says: "There was little point in moving BPL onto the system Metamorph was using as its CMS was actually better and has continued to improve over the past 10 years."

But Metamorph wanted staff who had worked in conveyancing at former Linder Myers to be able to work on BPL's CMS – and any other conveyancing firms that are acquired in the future for that matter – but still be able to print these documents at their own firm.

As it stood at the time, there were effectively two firms with two separate networks and the main hurdle they faced was finding a way to give each access to the other's IT system.

McGuire approached Converge TS, explained the challenge and asked if there was a way to get current and future users onto BPL's CMS without having to install additional communication lines and hardware.

"Converge TS proposed to implement a domain trust. Basically, it created a trusted link that allowed users on the Linder Myers network to log on and use BPL's system, without the need to install that software internally," says McGuire.

Following the latest acquisition of Terry Jones Solicitors early in 2018, Metamorph is now working on three IT platforms. "We've got two big projects on at the moment in IT. One is to have everyone working on one CMS, and the other is to have a single IT platform because at the moment we've got three," says McGuire.

Terry Jones will be incorporated directly as part of that greater project, and it is hoped that this will all take place by June 2019.

The plan to move everyone onto one IT platform comes from the board, which McGuire's IT team now needs to implement. "We'll buy the hardware and host it in a data

## THINKING ABOUT THE MOVE?

### MICHAEL MCGUIRE SHARES HIS TOP TIPS

**O**perational leaders are aware of the growing footprint technology is stamping on the legal sector. However, most become nervous because of the anticipated pitfalls that come with implementing new IT infrastructure.

McGuire says you are more than likely to experience challenges along the journey, but these will change from one firm to another. McGuire shares top recommendations for smooth migration:

- Be transparent about what you set out to do. Have a clear objective for what you want to achieve, how that will be implemented and the impact it will have on your employees.
- Take your people with you and keep the communication lines open. Make sure they understand what is going to happen so that the change doesn't come as a sudden jump that nobody was prepared for.
- Set realistic milestones for a project – and try your best to stick to them. My own team was panicking about not being ready. I said, we'll never be fully ready. And I pushed and encouraged the team to stick to the deadline.
- Accept that things can change. As much as we were committed to the agreed timeframe, we had to take a step back when we acquired Terry Jones because we then had another 120 people to think about. So, we introduced another step into the project. You have to keep flexibility in mind because in the real world, things change and we never know when the next acquisition is around the corner.



centre so that it's geographically independent. Luckily, we've got the resilience, but there are other services we need as well."

One of the services McGuire is focused on is the helpdesk. BPL has a helpdesk that currently supports 170 people, but it could not support the combined firm's workforce without employing more IT staff. Unlike BPL, Linder Myers and Metamorph don't have an in-house service, and so they currently use Converge TS's helpdesk.

"Our total headcount is now at 435 and that number could double in the next few years. It's not realistic to constantly recruit more IT staff each time we need to manage the change that comes with new firm acquisitions.

"Going forward, we will have our hardware that we own and operate from a data centre, and then

we will add tiers of service on top."

McGuire says Converge TS's proficiency is evident in the fact that helpdesk tickets are consistently around three or four per day – dramatically down from the regular 35 there used to be.

"The fact that we have so few tickets now shows how Converge TS has improved the infrastructure and made it more reliable," he says. And once everyone has transitioned to a single platform, Converge TS will be the only helpdesk managers.

### THE WAYWARD JOURNEY

Together with Chris Cann, CTO and head of compliance at Metamorph Law, McGuire was also tasked with coming back to the board with a sole CMS recommendation.

"As we focus on private client work, the key departments that we needed to get on board were conveyancing and probate – they're our big users of the CMS."

McGuire and Cann reviewed several competitor systems but, after demonstration sessions with the key departments, Visualfiles from LexisNexis came out on top as the CMS of choice.

When the time comes to transition onto Visualfiles, conveyancing will be first to go, followed by probate. Although BPL already had a highly developed conveyancing system, the firm will be gradually moved over to the new CMS with aid from Converge TS.

"A key thing to keep in mind about big projects

### LPM FIRM FACTS

**Metamorph Law**

**Revenue: £22m**

**Corporate status: Limited company**

**200 fee earners, 435 total staff**

**Office location: Manchester, Lytham, Chester, Shrewsbury, Telford, Newport, Bristol, Dorchester, Bournemouth, Lymington, Southampton**

**“A key thing to keep in mind about big projects like these is to try to stick to deadlines and timeframes as best you can, but things change. One thing that moved the goalposts for us was the acquisition of Terry Jones – another 120 people to factor in all of a sudden.**

”



“The service that Converge Technology Specialists offers all leads back to and supports the firm’s wider business objectives to continuously grow and expand.”

like these is to try to stick to deadlines and timeframes as best you can, but things change. One thing that moved the goalposts for us was the acquisition of Terry Jones earlier this year – another 120 people to factor in all of a sudden is a lot to think about,” says McGuire.

With such a high intake of new staff, McGuire says Metamorph is now challenged with managing the same departments in all combining firms – so the skilful juggling of systems must continue.

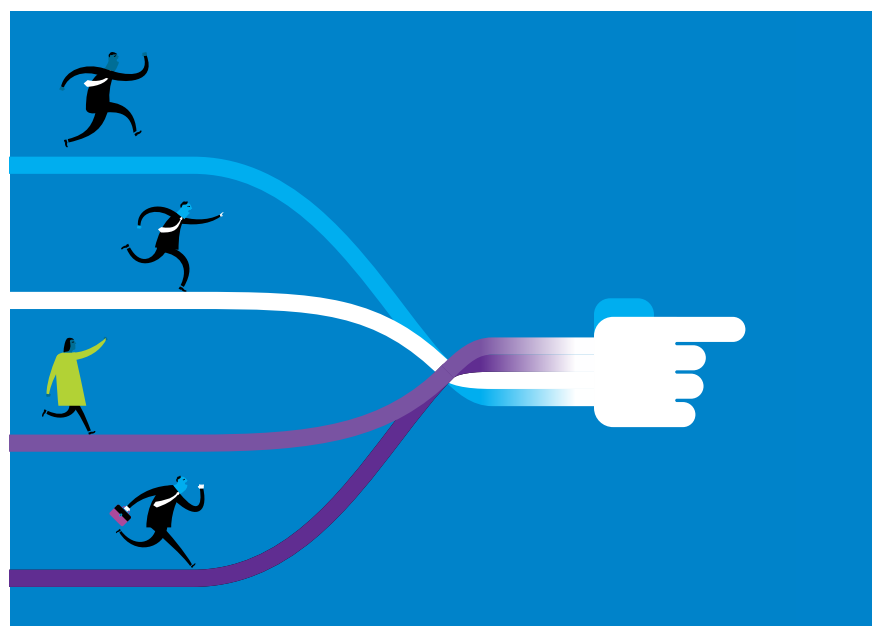
“If we consider family law alone, we’ve got a team in Manchester at Linder Myers as well as a team at Terry Jones in Shropshire. They’re doing the same work but using different systems, which makes for a lot of similar data being held in different places. From an operational standpoint it is very difficult to manage – it’s vital for us to have everyone working together on one system,” says McGuire.

The IT team was in conversation with Converge TS about moving everyone onto Visualfiles but, he explains, there were concerns surrounding the doubling of potential problems – as there will always be glitches when moving onto a new system. “Understandably, people don’t like change, and IT doesn’t like change when we’re on the wrong end of it,” he says.

With the ultimate objective of getting everyone onto Visualfiles, McGuire explains that there will be two moves involved. He says: “We’ve introduced a new stage in the Visualfiles project. The plan is to move everyone from a particular department, for example family law, onto the same system – whether that’s using Linder Myers’ or Terry Jones’ respective systems. This way they’ll all be on one system and thereafter we’ll move them onto Visualfiles.”

There has been great debate surrounding whether it’s better to migrate employees over in two smaller moves or one large one, he adds.

“Overall, I think it’s the best option to do the move in two stages because there will be a more consistent view as to how we want things done in future. We’ll move everyone onto one existing CMS, then let people settle for a few months before throwing up more change. The complete move to Visualfiles will happen some time in 2019.”



## PARTNER UP

Converge TS has been involved in the majority of Metamorph’s IT integration strategies – and has become even more heavily involved as the firm works toward the single IT and CMS platforms. The service that Converge TS offers all leads back to and supports the firm’s wider business objectives to continuously grow and expand, McGuire says.

He says Converge TS helps to make that possible by managing the infrastructure, allowing employees to work remotely (thanks to hosted desktops), managing IT enquiries through the helpdesk and enabling the firm to focus on more strategic issues.

McGuire sees a clear advantage in working with a specialist provider for the legal sector, as Converge TS understands the workings of a law firm and its applications. “If I call Converge and say I’ve got a problem concerning compliance or a regulatory issue, for example, they understand. They’re also familiar with the CMS applications that support the legal sector, so that’s very helpful.”

There are trusted lines of communication between Metamorph and Converge TS, and McGuire says that he’s often happy for the Converge TS team to go ahead and make changes they deem necessary without having to run it past him first.

“I speak to our account manager on a regular basis and Converge TS can also relate to our challenges at the moment as they’re looking to expand. They’ve recently brought on a new CCO and CFO, both of whom Cann and I went to meet to exchange ideas about our respective businesses’ future plans.”

Converge TS has already seen Metamorph through its early challenges, and there is clear confidence in the value of its service as the firm factors projects into the many more to come. **LPM**

## ABOUT THE SPONSOR

**Converge TS** provides law firms with mission-critical managed cloud services including IaaS, hosting, business continuity and security services.

[www.cts.co.uk](http://www.cts.co.uk)

**converge**  
TECHNOLOGY SPECIALISTS

# TOTALLY TRANSFORMED



Peter Gill, chief commercial officer at Converge Technology Specialists, talks through ensuring your IT function delivers your legal software solution on time and within budget

With extensive experience working for software vendors, I have seen my fair share of firms choosing a new practice or case management solution without considering the totality of the firm's situation.

Modern legal practices rely on a multitude of software applications to deliver their services quickly and efficiently. Transitioning to new software – or moving an existing application to the cloud – involves intricate exercises with a lot of moving parts, a wide array of stakeholders and no room for project failure.

Key considerations to keep in mind when putting together your project team are avoiding costly downtime, configuration errors and the potential for project stagnation.

## SIZE UP YOUR SIDE

First off, take a good look at your in-house IT department. It could be that they have the time and skillset to take on an intense project of this scope, but equally it could impact their ability to deliver general maintenance and day-to-day services during the implementation.

Think about whether you have the knowledge, skills and resource to deliver a legal software implementation successfully along with other overlapping projects – you don't want to overload your team.

In the end, few firms find they have the capacity required to design and build new environments while simultaneously servicing the rest of the practice's requirements. Consider whether you could outsource key areas of the project to speed up the process – project management or infrastructure build and monitoring, for instance. Many firms have successfully onboarded additional resource to run business as usual in order to enable the key personnel to focus on project delivery.

However, knowledge gaps don't necessarily equate to areas to outsource. You could delegate tasks to a broader range of staff or pair

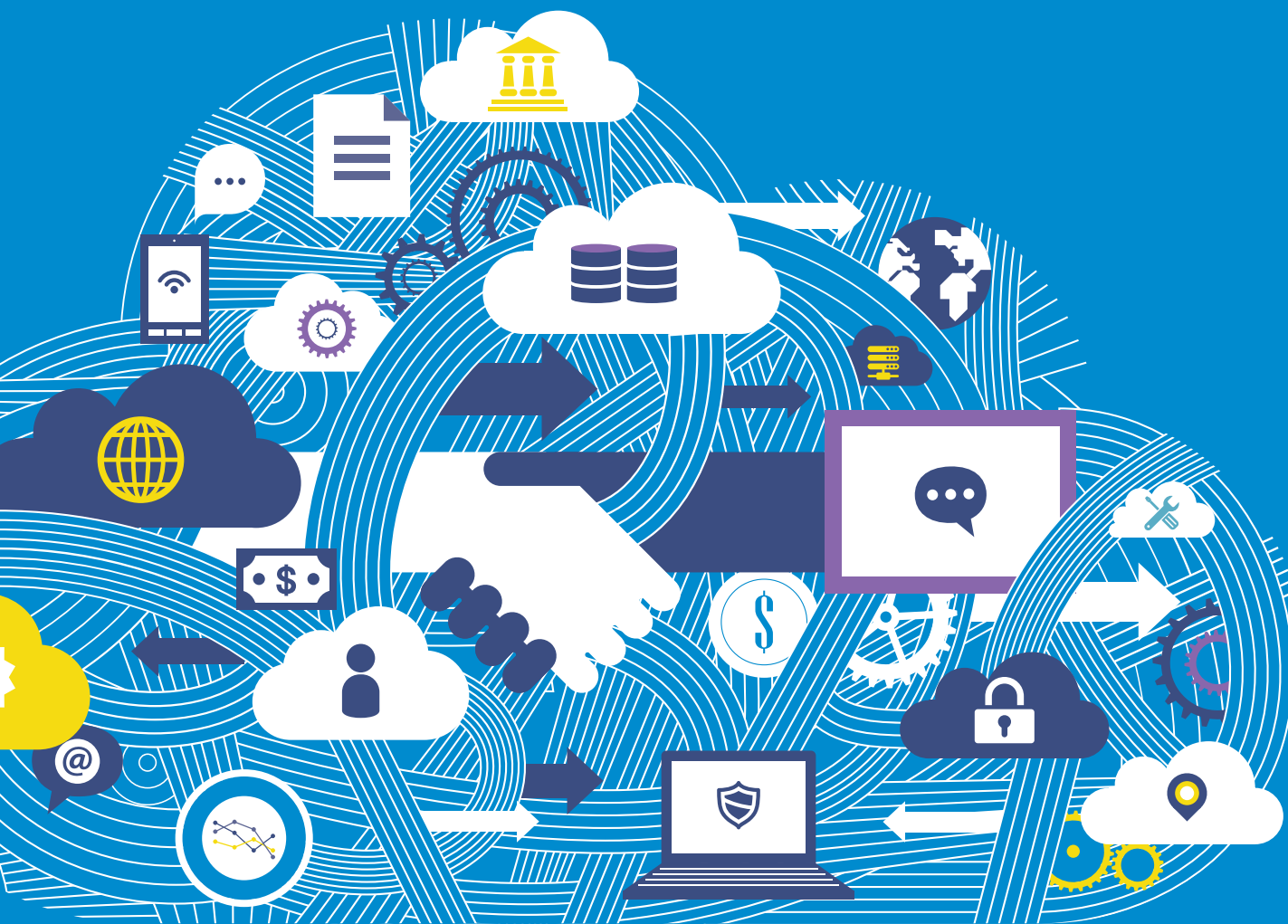
employees with overlapping knowledge sets. For example, have the finance director support an IT manager with calculating the total cost of ownership. And in the longer term, you could consider augmenting platforms or application-specific knowledge with specialist training courses for key members of your staff, which will help lessen your reliance on third parties once your project has been delivered successfully.

## TAKE IT SERIOUSLY

IT resourcing is a key limiting factor when measuring the success of newly installed systems and it's for this reason that so many firms decide to form a hybrid team of in-house staff and partner support. While there are a multitude of companies offering cloud and IT services, firms are increasingly opting for partners with extensive legal sector experience.

The key to success is finding a partner who understands your systems, processes and objectives, and has the ability to map out an IT strategy that supports your firm's goals. Specialist suppliers to the legal sector have better understanding of the regulatory environment and the challenges firms encounter, and of working with their clients to align technology use with their business strategy. Avoid buying an out-of-the-box service – your firm and its needs are unique. Each firm will have its own specific requirements and your IT partner should offer you layers of ongoing management tailored specifically to your needs.

A specialist will also work closely with third-party practice and case management software providers, harnessing strong relationships with their counterparts to facilitate smooth project delivery. Choosing an IT partner that has an established relationship with your software provider means it will have deeper knowledge of the application as well as the ability to execute a high proportion of fixes without having to involve the firm directly, reducing the possibility of your IT manager feeling stuck between both parties.



If you're hosting the software yourself, your software provider will usually indicate the resource requirements. However, for an accurate picture, it's usually best to use a specialist IT partner that understands your use case and software applications in order to forecast those costs accurately.

We've seen examples of this at both ends of the spectrum, often finding that law firms overpay for resources that aren't utilised. Firms are also faced with significant cost increases due to their provider underestimating resource requirements to reduce the overall perceived total cost of ownership, as this ultimately helps them to close the deal.

Working with legal specialists also gives you the reassurance that they are experienced in dealing with the specific compliance requirements of law firms, including SRA guidelines, Lexcel requirements, General Data Protection Regulation obligations and other non-legal specific regulations.

#### ENGAGE ACROSS THE FIRM

Continuous communication between all stakeholders is key. Make sure your project team includes leaders from each business function, as

well as decision makers with influence over the project. Having the right people in place will improve the project's progression and keep your employees involved and engaged.

With most implementations, the problems have less to do with the software and more to do with a combination of project fatigue and the lack of a culture that embraces change. Gearing your firm up for change is vital and it's equally important to select business partners who are seasoned in dealing with this specific type of implementation.

Identify influencers within the firm who are likely to grasp new technology quickly, can be involved in the project from start to finish, and who will help as 'boots on the ground' to champion the adoption of your new system. These individuals can support you at all stages of the project, provide vital insight, help to gain buy-in across the firm and field lower level queries, while providing user support within their teams during the rollout phase.

Positive engagement across the firm will determine the success of the implementation. This is a time-consuming and challenging project for most firms but, with the correctly configured systems in place, will drive future profitability for years to come. **LPM**

#### ABOUT THE SPONSOR

**Converge TS** provides law firms with mission-critical managed cloud services including IaaS, hosting, business continuity and security services.

[www.cts.co.uk](http://www.cts.co.uk)

**converge**  
TECHNOLOGY SPECIALISTS

## The Legal Sector Specialist

We're the only cloud provider dedicated to UK law firms which means our expertise and focus is second to none. We understand the regulatory environment, challenges and opportunities faced by firms today and we work with our clients to align their technology use to their firm's strategy.



CLOUD  
INFRASTRUCTURE



MANAGED  
SUPPORT



DISASTER  
RECOVERY



NETWORK  
SECURITY



TECHNICAL  
CONSULTANCY

To find out how we can help your firm call us  
on **0345 872 4400** or visit **[www.cts.co.uk](http://www.cts.co.uk)**



**THOMSON REUTERS®**  
ELITE-3E® Alliance Partner



# PLAY PI SPY

JANINE PARKER, THE BROKER

The solicitors professional indemnity insurance (PII) renewal season is upon us once again, and early indications are that the market is beginning to show signs of hardening. It's worth considering where and why we are seeing these changes, so that firms can best prepare for not only this renewal period but for renewals in the future. What is the most important factor to you when selecting your professional indemnity insurer, and what should you be looking out for?

In the excess layer market, several key insurers have withdrawn completely from writing professional indemnity. These insurers had significant excess layer books, which they no longer wish to insure, and the underlying reason for this is clear – claims. Despite a relatively benign claims environment, solicitors still incur a significant number of attritional losses, even during a time when the economy is growing. It's inevitable that some of these losses will spike into large quantum amounts that can wipe out all the premium earned with very few claims. Therefore, in the current market, insurers either have to increase their rates significantly or decide that their capital is best allocated in areas that provide better opportunities to produce a profit for stakeholders. Currently, many insurers have chosen to withdraw completely while those who remain are seeking to increase their rates.

In previous years, new capacity would have entered the market and nullified the impact of these changes, and prices would have stayed relatively flat. But if we consider the current broader economic and political situation, there is significant uncertainty, which means that insurers are reluctant to come in and take over books of business that have been generating loss for others. Underwriters simply cannot make a sensible business case to management.

Moving to the primary market, there again appears to be a desire from insurers to increase rates. There have been many high-profile construction losses in the wider professional indemnity market, and solicitors, given the depth of cover provided by the minimum terms and conditions, continue to suffer consistent losses. Diligent insurers will closely manage their portfolios to ensure that they can continue to write the class of business over a sustained period of time. Sometimes, this will lead to rate increases that no firm likes to see but which, in a cyclical economy, are inevitable. While no one can predict with any certainty what the economic position will be in a year, we cannot ignore that it's now been 12 years since the last downturn. Interest rates are starting to rise, the housing market is uncertain and many insurers suffered significant losses last year.

There are those who would argue that we'll never see a hard market again (where prices rise significantly and choice is greatly reduced) but there are signs that we are approaching one. For law firms, partnering with the right insurer at this time is essential. Price will always be a factor, but it should not be the only factor. Take the time to go into detail about your insurer's capacity and the strength of its balance sheet. What is its track record in the market and what is its underwriting philosophy? What other services does your insurer provide? There is a great variation in product offerings outside of the standard wording.

Finally, at a time when many firms are growing, it's imperative to ensure all staff continue to adhere to your risk and business management procedures – it is the work you carry out now that will be under scrutiny in years to come should the economy turn. **LPM**



“Despite a relatively benign claims environment, solicitors still incur a significant number of attritional losses, even during a time when the economy is growing.”

## ABOUT

Paragon LawSelect  
Brokering and practice  
improvement  
Contact:  
020 7280 8259  
[www.paragonbrokers.com/  
lawselect](http://www.paragonbrokers.com/lawselect)





# THE WIDEST RANGE OF LEGAL BUSINESS MANAGEMENT JOBS

Using LSN jobs you can search for roles UK-wide, benchmark your salary, upload your CV and register for job alerts to make finding your perfect role even easier.

VISIT [LSN.CO.UK/JOBS](https://lsn.co.uk/jobs)

## ARE YOU RECRUITING?

Contact [ashb@lsn.co.uk](mailto:ashb@lsn.co.uk) to find out how you could use LSN to source candidates.



# EVOLUTION OR REVOLUTION?

ADRIAN JONES, THE TECHNOLOGIST

As consumers of cloud products and services, we have come to expect unlimited access, anytime, anywhere, through simple user interfaces. IT providers within organisations want cloud services that have the ability to be fully scalable, reliable, efficient, and maintain the highest quality of service and security. The advance in technology of smartphones, and other mobile devices, has opened up opportunity for a more productive workforce where cloud and agile working can be harnessed.

However, as IT professionals begin to look seriously at the possibility of migrating away from on-premise servers to a hosted cloud environment, they cannot simply disregard the large investment they have already made in existing technology systems. Firms have historically had all systems deployed onsite and therefore have significant investment tied to them.

Many firms are already using cloud technology without really thinking too much about it, using solutions such as Workshare Connect, Dropbox, OneDrive or NetDocuments. Firms shouldn't be thinking they have to be '100% cloud-based or nothing' when making choices, or that agile working can only be achieved using the cloud.

Becoming entirely cloud-based is a long way off for most firms as technology still has a way to go to overcome some of the limitations that prevent applications matching on-premise counterparts. The challenge now is to operate a hybrid technology infrastructure, combining cloud and onsite solutions to achieve an agile working model. The combination of connected, fully integrated, on-premise, pure cloud and virtualised environments allows law firms to take steps towards the goal of pure cloud. The advantages of the integrated mixed technology stack are streamlined user experience, increased productivity and agility – regardless of where the application is hosted.

If you're looking at innovating your technology to support agile working, consider the following:

- Your practice management system (PMS) should be central to everything you're doing. Ensure that it can support integrations with cloud-based applications as well as onsite ones, as this will enhance your firm's ability to work in an agile way in a mixed environment. This also applies when your PMS is in the cloud.
- Firms need to be careful about picking solutions from suppliers with limited integrations. This is because the benefits realised from the cloud approach could then be diluted by the challenge of managing data that is disparate and unconnected, in different places with varying terms and conditions, as well as experiencing technical challenges.
- Don't try to tackle everything at once. Moving to a purely cloud-based model is a big commitment. Agile working is a journey and adopting an integrated technology approach will provide users with access to the best-of-breed cloud applications, which will further allow agile working without compromising the functionality of your central PMS.
- Take the time to understand where that data is stored. Have a single, central data source, which should be your PMS database – that way, regardless of where other applications and integrations are hosted, data is flowing back to the same central repository.

The more forward-thinking law firms absolutely recognise that stagnating is never an option, but also recognise that cloud and agile working requires an evolution of working practices and technology setup. It's not just about moving to the cloud at any cost. **LPM**



## ABOUT

Tikit  
Leading practice and case  
management provider  
Contact Adrian on:  
01489 609 010  
[www.tikit.com](http://www.tikit.com)  
@TikitGroup

tikit

# Would you like your practice to be paper lite?



1. Call ADDS, we can help!

2. Book your free consultation.



3. We organise and pack.

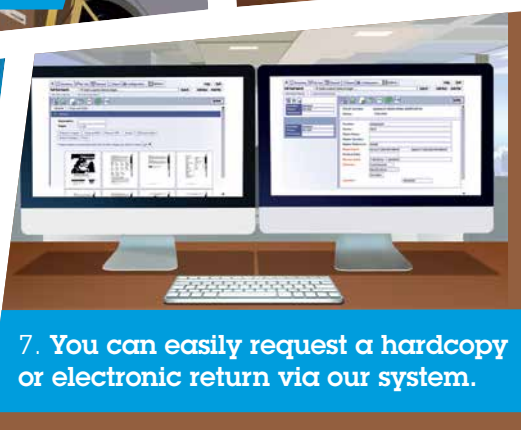


4. Then uplift and transport to our secure records management facilities.

5. Each file is barcoded and indexed.



6. Then stored safely and securely.



7. You can easily request a hardcopy or electronic return via our system.

**Archive  
Document  
Data  
Storage**

You can count on us

## Contact us now for a free consultation

☎ 0800 328 0272 | 💻 [www.archivestorage.net](http://www.archivestorage.net) | ✉ [filequeen@archivestorage.net](mailto:filequeen@archivestorage.net)  
📷 @filequeenadds | 🐦 @filequeenadds | 📘 ArchiveDocumentDataStorage



# COMPELLING PARTNERS

Changing hearts and minds among law firm leaders is a bit tricky – Charlotte Bastiaanse puts together the how-to guide for gaining buy-in, generating consensual agreement and punching at board level for operational leaders



**T**he majority of businesses adopt a corporate structure and decisions made at board level trickle down through layers of management leaders. Law firms traditionally work a little differently, with layers of partners ultimately dictating how the firm is run as a business.

The legal sector is finally moving toward corporate models. There's an increasing shift in leaving the law to the lawyers and the running of the business to operational leaders, but many SME firms are still playing catch up when it comes to restructuring management and delegating responsibility.

While there is progress, operational leaders also still seem to be having to do a lot of leg work to get their seat at board level by winning partners' trust.

## EXPANDING THE COMMUNITY

When it comes to the general trend in law firm management, specialist adviser to law firms worldwide Nick Jarrett-Kerr says there's an increased understanding that running a legal business is complex and time-consuming, and though the trend in restructuring management is glacial, change is underway.

"Smaller firms are typically sector-focused and boutique, which allows them to have a relatively simple and straightforward management structure. However, being smaller also means firms can't necessarily afford to have a full C-suite, and so they end up being heavily driven by a small oligarchy of partners," he says. "Firms are trying to pay £30,000-£50,000 for a manager and they're getting someone who's at that level. They can't afford a six-figure sum, and that's actually who they need," says Jarrett-Kerr.

While not all firms can afford a management team, Simon Goldhill, founder and director of strategy at Metamorph Law, says that the traditional 'owners as operational managers' model is starting to shift. "The market needs to change. And that change is being driven by clients. Unless firms are prepared to switch focus from what works for them to what works for the client, they'll find themselves at the bottom of the pile very rapidly," he warns. Goldhill says that new management models are starting to emerge, with more firms moving away from partnership and towards corporate structure. He says: "It's a much better model for building and running any business, never mind a legal professional services business. It's going to be a long, hard haul because restructuring involves a huge amount of cultural change, but there are signs that it's starting to happen."

Client expectations may be motivating firms to bring in operational leaders in HR, IT, finance, risk and business development, to name a few, but Tim Scott, head of people at Fletchers Solicitors, believes that a connected driver of change is technology. Clients are wanting more transparency, efficiency and communication and technology helps to achieve that. "The lawyers have had the law to themselves for most of history, but now it's about involving people from other disciplines," says Scott.

There is an increasing trend of bringing in leaders from external sectors, and Scott shares that his firm experienced a big turning point when it hired a chief operations officer from a retail background, who encouraged the team to focus on client experience.

Family Law Partners also does things a little differently at board level, and head of innovation and technology, Alan Larkin, says: "We used to have a business coach for three years whom we deliberately recruited from the retail sector. She challenged us to look at the client journey and encouraged us to treat our employees as internal clients." You've got to be as alive and responsive

to your own team as you would to your most important client, says Larkin. "When we felt we had grown up a little, we cast around again for a non-legal background to fill the role of a non-executive board leader. We recruited a woman from a technology and innovation background, and she has been chairing our board meetings for the past nine months. She challenges us, holds us to account and makes sure all our actions are measurable."

Although his firm appears ahead of the curve, Larkin feels that legal is still playing catch up with other sectors when it comes to such leadership and management change. "Firms are still playing with the idea of improved management structure rather than really trying to incorporate behaviour that promotes leadership and delegation of responsibility," he says.

HR director, Lucy Palmer, says that her voice is very much heard at Stephens Scown. She says that partners have accepted that operational leaders also need to be at the heart of decision making so that they can drive the strategy of the business forward in their respective areas. "It's also important for employees to see operational leaders with seats on the board. They want to know that there's a voice in those meetings on their behalf, and that that person is involved in top-level decisions," she adds.

## SHARING THE STEERING WHEEL

With management roles evolving, where do we draw the line between the decisions partners do and don't need to be involved in? Jarrett-Kerr says: "Partners are still the engine room of the firm in terms of legal services delivery and the driving of revenue but there's a whole raft of decisions that they don't need to be involved in, and are actually best not involved in (like the next team-building activity or the colour of the carpets). Provided that the partners receive the necessary reports, they're kept updated on what's happening in their team or department, and they're consulted on major matters, then they should be more prepared to let someone else take the reins on management decisions."

Larkin believes partners need to reach an acceptance stage, where they acknowledge that they don't sit at the top of the hierarchy when it

**“Unless management is prepared to switch focus from what works for them to what works for the client, they'll find themselves at the bottom of the pile very rapidly.”**

Simon Goldhill, founder and director of strategy, Metamorph Law

**“If they believe they’ve recruited the right individuals into operational roles, they will be confident enough to leave decision-making responsibilities to them and trust their judgment.”**

Lucy Palmer, HR director, Stephens Scown

comes to understanding a firm’s challenges. He says: “Once firms have brought in leaders from HR, IT, finance and marketing, they need to genuinely listen to them and assure them their judgment is trusted, and they’re supported in their decisions.”

Larkin says that partners do need to be involved to an extent, even if it’s just at the formulation stage. “You’ve got to have the forum for discussion at least because it’s important to allow dissenting voices to be heard – it’s healthy. I don’t believe it should be the board saying ‘this is our decision, suck it up’ because that is clearly demoralising. You’ve got to allow the opportunity for discussion with the partner cohort.”

Palmer says partner involvement will differ from firm to firm, and it depends on whether a firm has operational leaders. “If a management team exists, partners needn’t be involved in anything other than light touch decisions. If it doesn’t, then partners need to step into that role of making business decisions for the firm,” she says.

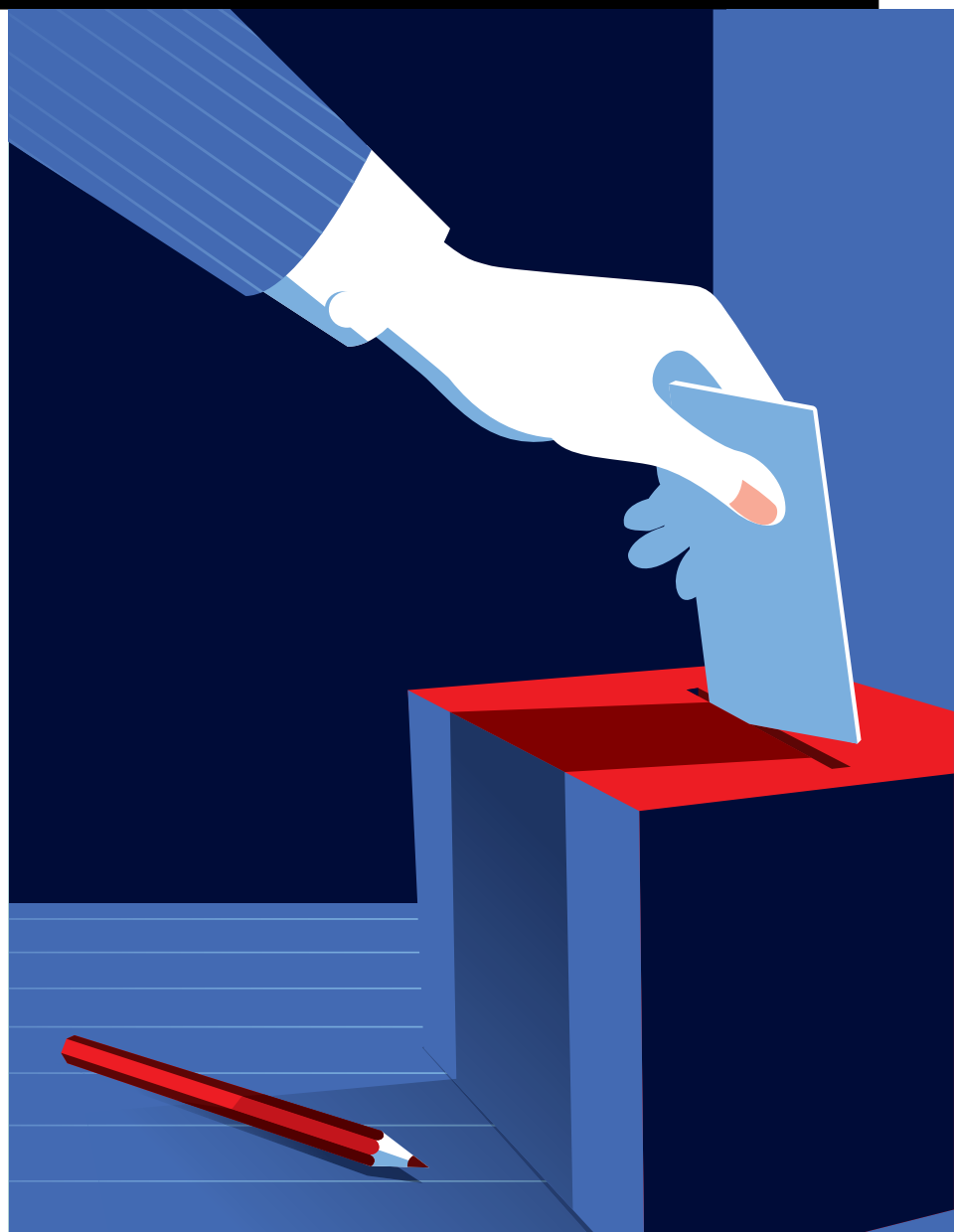
“However, if they believe they’ve recruited the right individuals into operational roles, they will be confident enough to leave decision-making responsibilities to them and trust their judgment,” adds Palmer.

## BUY-IN POWER

While it’s easy to imagine what law firm management structure should ideally look like, convincing partners to delegate responsibility remains challenging for operational leaders.

“Lawyers are stereotyped as instinctively cynical, mistrustful and second-guessing, which can make them seem unapproachable to management,” says Jarrett-Kerr. “It can take a lot of patience and perseverance for a senior manager to understand that someone in IT, for example, knows a lot more about technology than they ever would.”

He adds that, while buy-in largely comes down to credibility and respect for a person, everyone will always ask the question, “What’s in it for me?” “What they don’t want to hear is change for the sake of change. They’ll see it as an added load to their already busy lives and they won’t see the benefit. If it can be explained that a different management structure could directly help them by saving their time for more important legal



matters, for example, then you’ve got a shot. Different people also have different buttons, and you have to work out how to tap these,” says Jarrett-Kerr.

Scott shares in that sentiment and says that management leaders need to find out for themselves which levers will pull a partner’s interest. “For many, the lever is financial. In my area, for example, we could measure how much we’re spending on people and ask ourselves: if we could reduce that number by 10%, would that help with the profitability of the business? If you can present it like that to key leaders, you might gain some traction.” It doesn’t always come down to cutting costs though, says Scott. The person also has to have a credible reputation, and they need to show that they understand the strategy of the business and the part they play in achieving that goal. “Start with some quick wins. That reinforces your credibility, and then when you come back with a bigger and bolder idea, hopefully people will be more prepared to listen.”

Palmer agrees that gaining buy-in is achieved by getting under the skin of a business and showing your understanding of it. “You need to know what success looks like through the eyes of the partners. To gain their confidence, you need

### LPM FIRM FACTS

#### Family Law Partners

**Corporate status:** Limited

**12 fee earners, 15 total staff**

**Office location:** Brighton, Guildford, Hampshire, Horsham

### LPM FIRM FACTS

#### Metamorph Law

**Revenue:** £22m

**Corporate status:** Limited

**200 fee earners, 435 total staff**

**Office locations:** Manchester, Lytham, Chester, Shrewsbury, Telford, Newport, Bristol, Dorchester, Bournemouth, Lymington, Southampton



to share in their vision, deliver those desired outcomes and measure your contribution.”

When you want to introduce a new project, having a clear plan is essential, says Larkin. “Present your idea to partners in the relevant departments and ask for their feedback. Get some validating feedback and refine your project,” he advises. Then, when it comes to presenting at board level, your project should be concise, and they will feel reassured knowing that partners have shared in the shaping. “But still anticipate some push back and difficult questions. And don’t interpret that resistance as weakness in your plan. Be very clear on what constitutes success, but also be sure to point out what failure might look like as well.”

Larkin says that partners and board members have been unforgiving in the past when it comes to taking a chance on something new, whether that’s management structure or tech, for example. “You never risk a client’s money or welfare, but you can risk the firm’s money to a degree. There’s always been an intolerant attitude towards failure because it’s only ever seen as that. It’s never seen as a learning opportunity and that makes people too scared to

**“A firm needs to recognise its next generation of leaders and engage them as soon as possible, because the sooner they feel involved in the future of the business, the sooner they’re able to contribute.”**

Tim Scott, head of people, Fletchers Solicitors

stand up and be a little different. It’s very damaging to the innovation of the firm.”

## IT COMES DOWN TO CULTURE

How a firm decides to structure its decision-making responsibilities reflects its culture, but there are as many possible cultures as there are partners, and certainly no one-size-fits-all model, says Jarrett-Kerr.

“You’ve really got to work on your firm’s internal culture and employees need to buy into what you’re doing,” says Goldhill. Especially when it comes to running a firm as a large business – the culture has to allow for trusted delegation of responsibility to professional managers, he adds. “People often ask me why I’m not running the business and it’s very simple: I don’t have that operational experience. The people who we have brought in as our senior operational managers are the right people for the job as they’ve had years of relevant experience at large organisations,” he explains.

Larkin agrees that a firm recruits operational leaders because senior members acknowledge that these experts bring valuable knowledge to the firm. “You have to believe in them,” he says. “However, what has happened historically is that those leaders come in, but they’re not given respect nor are they listened to, and the partners’ voices still dominate the running of the firm. Those talented people end up leaving because they’re shown no level of trust – it’s puzzling when partners decide to invest in those human resources but then completely ignore them.”

He adds: “There are lawyers sitting around the partnership table whose time is up. They’re not business owners, and they’re actually quite resistant to change. It’s hugely damaging to the talent that’s been brought up in the firm. Sometimes you have to have an honest discussion about whether a person should still have partnership status, as difficult as those conversations are.”

When it comes to retention, Palmer says some firms are still lacking the cultural shift that is necessary to keep hold of talented people. “The wellbeing of the employee has to come first. You have to create meaningful work and invest in your people. A firm also has to create a multi-generational culture. Millennials are very technology-led, and they want challenges and greater responsibilities.”

Scott says that a firm needs to recognise its next generation of leaders and engage them as soon as possible, because the sooner they feel involved in the future of the business, the sooner they’re able to contribute. He says: “Firms are challenged with bringing fresh thinking to the top of the business. Partners need to stay aware of what other firms and business sectors are doing to engage employees and maintain healthy work culture. Just because a model is working today doesn’t mean you continue on blindly – other businesses might embrace change quicker, and the firm could be in trouble if employees decide to vote for another team with their feet.”

The firm’s leaders should know their people really well, says Jarrett-Kerr. If they can really tap into what makes their employees tick, then they’re in a good position to understand their concerns and challenges



and address them accordingly.

Although we're all tired of hearing about it, a great challenge that continues to loom over all industries is Brexit. While all the focus may be on the lawyers for now, operational leaders will have their chance in the spotlight as soon as Brexit is out of the way.

Larkin believes there's a perfect storm coming for legal services because the market is changing, it needs more transparency, and it needs inclusive management models. "Regulators are going to have legal services in their sight when Brexit is over and done with. The best thing that could've happened to some law firms at the moment is Brexit because it's sucking up all the attention. There is still too much blockage to consumers and small business enterprises receiving the quality legal advice that they need, and operational leaders play a role in delivering those services. We've got an opportunity as legal professionals, business owners and leaders to put those internal changes in place now so that we keep some element of control, and do our part in driving the industry forward."

**“We’ve got an opportunity as legal professionals, business owners and leaders to put those internal changes in place now so that we can keep some element of control, and do our part in driving the industry forward.”**

Alan Larkin, head of innovation and technology,  
Family Law Partners

While there are many SME firms that have successfully implemented improved management structure, many still have a way to go. There is certain change on the horizon, and as Goldhill says, the legal market is going to generate a very different landscape over the next 20-odd years, and operational leaders are going to play a tremendous part in shaping it. **LPM**

#### LPM FIRM FACTS

**Stephens Scown**

**Corporate status: LLP**

**310 total staff**

**Office locations: Exeter,  
Truro, St Austell**

#### LPM FIRM FACTS

**Fletchers Solicitors**

**Revenue: £26m**

**Corporate status: Limited  
company**

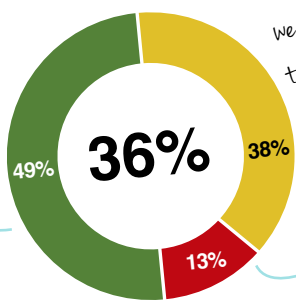
**291 fee earners,  
396 total staff**

**Office locations: Manchester,  
Southport**

### Client Feedback Report

#### Loyalty

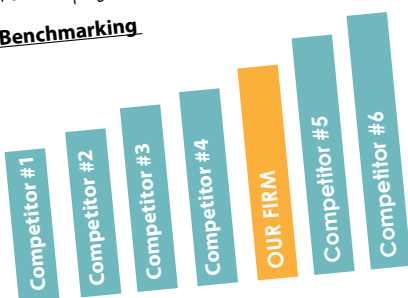
Loyal promoters -  
how do we get  
more referrals?



Too many passives,  
we need new ways  
to improve service.

What's the main source of our detractors?  
We need to plug the gaps!

#### Competitive Benchmarking



## Leading firms measure Net Promoter Score\* to forecast future revenues

## Nisus provides the tools, know-how and benchmarks

To access market insight and find out how your firm compares, contact the research specialists.



Graham Archbold, Research Director  
07771694094  
graham@nisus.net  
www.nisus.net



Client feedback



Brand audit



Thought leadership

\*Developed by Fred Reichheld and Bain & Co.

**NISUS**  
CONSULTING





## Northridge Law Making a break

Jon Walters, co-founder and partner at Northridge Law, tells Kayli Olson what it takes to set up shop

It's not an easy decision for a market-leading team from a top-30 firm to set up their own firm – but, in October 2017, that's just what Jon Walters, James Eighteen, Jonathan Ellis and Ian Lynam did in leaving Charles Russell Speechlys to establish Northridge Law, a specialist law firm with a particular focus on the sports sector.

Walters, co-founder and partner at Northridge Law, says that he and his fellow co-founders saw an opportunity to do something different.

"In the past, bigger was considered better for a law firm but in recent years that idea has very much been turned on its head – there are many specialist, niche firms that are absolutely top of their markets. We felt that we could better speak to our clients and deliver on our mantra 'When the stakes are highest' as an independent firm."

The move was carefully planned out – they had a six-months' notice period to work through and wrap things up with their former firm.

"We had our final day on 21 October 2017," says Walters, "and then we opened our new doors two days later – out on a Friday and started on a Monday. It was not without the odd hiccup though, but we couldn't have wished for a better transition and we're delighted to have solidified relationships with our existing client base and attracted an exciting list of new clients post-launch."

Walters also says one of the greatest endorsements was the faith shown by the rest of the team in joining them.

"We have some great relationships with our clients, and not just at partner level. Our associates and trainees are all

From left to right: Ian Lynam, founding partner; Laura Highwood, office manager; Jon Walters, founding partner

Photo credit: Jonathan Goldberg

## NORTHTRIDGE



### LPM FIRM FACTS

**Northridge Law**

**Revenue: still in first financial year**

**Corporate status: LLP**

**22 total staff, 20 fee earners**

**Office: London**

very close-knit and integral to those relationships – so it was heartwarming to see the amount of trust they put in us. Our size sets us apart on the most complex matters and having a team of four partners and 18 other fee earners is central to that.”

### SUPPORTS STARS

He says: “We really had to hit the ground running, so we brought Kindleworth, a management consultancy specialising in supporting law firms, onboard to help with managing and running the new firm.

“One thing we learned very quickly is that we’re lawyers first and foremost – we enjoy management but don’t pretend that we can do everything.”

There are so many moving parts to setting up on your own, Walters says – applying to The Law Society for a licence, sorting out professional indemnity insurance, setting up secure privacy and IT systems and getting people onboarded.

Kindleworth also provided outsourced support once Northridge Law was up and running – it provides the new firm with its finance function interface and CFO, compliance, HR and IT support.

Walters says the founding partners and Kindelworth hold fortnightly management meetings to put into practice key decisions.

“Our legal work takes priority – all four of us see ourselves as practising lawyers above being managers.

“So, we’ve appointed one of our managing associates, Hannah Brunskill, as our COO and alongside Kindelworth we have our office manager, Laura Highwood, to help with the daily running of the firm.”

### ATHLETIC AMBITIONS

Now that the firm is set up, the team is looking to expand its legal offering to clients. “First, we looked at the types of legal expertise we need. And one that

we’ve identified, for example, is that we wanted an employment offering. Similarly, investment and M&A work in the sports and entertainment sector continues to generate work. Each of these areas has been bolstered by recent hires.

“We want to be able to support our clients in the sport sector with as many of their legal needs as possible – from employing athletes for teams to endorsement deals for individual athletes.”

Northridge Law has big dreams – there’s no real multinational sports law firms out there, Walters says, so that’s definitely an ambition of ours. “We’re really looking to grow, and have increased our headcount by 50% since launch, but it’s difficult to forecast exactly what size we will become.”

### ROLL MODEL

At the moment, Northridge Law is in an office provided by The Office Group – one of the new wave of co-working and flexible office space providers. Walters adds that it fits with the culture they want to create: modern, a little less corporate but still high-end and professional.

“You hear the horror stories of firms that have saddled themselves with too much office space and it’s really hit their profitability. But it’s a balance – it’s important for the identity of the firm to have our own permanent space and just to make it properly feel like home. So it’s something we’re actively looking into,” he says.

Something else the firm is actively looking into is what it can learn from outside the legal sector. Walters says if you

only looked at what other law firms are doing, you’d be a bit blinkered.

On staff remuneration, for example, the trend right now in football is what they call minimum expected pay for players.

Players have a base salary and, assuming they and the team hit certain base metrics – play a certain number of games, qualification for the Champions League, or whatever – they get a bonus on top of that, which becomes part of the minimum expected salary.

“It incentivises that player to make sure they’re on the pitch and helping the team succeed, but it isn’t based on unrealistic, speculative or individual targets such as hitting a certain number of goals or assists. We’ve taken on that analogy for our sector. Our fee earners’ base pay at least matches silver circle firms, and then we want them to participate in the firm’s profit so that their package matches or exceeds even magic circle pay.”

“We treat staff as a fifth partner – 20% of the profit goes into a pool and then is shared out among the team equally. This is for all members of staff – trainees, office managers, PAs and so on. We really want to have a flat, collegiate structure here – we don’t want to exclude anyone and in this way everyone is incentivised to participate. In addition, a typical hours bonus applies for individual performance.”

Creating a law firm is something no one on the team took lightly. They all did a fair bit of soul-searching to decide whether it was the right move, says Walters.

“The biggest tip we could give to anyone in a similar situation is to be humble and not be afraid to ask for help from clients. We were able to build our website with lots of visual and audio content and images provided by our clients, which has been a huge part of our identity,” he says.

It shows that if you’ve got a good relationship with someone, it motivates you to work harder than ever before. **LPM**

## INDUSTRY VIEWS INDEX

# FUTURE FORWARD

*Strategies for tactical growth are essential for future-proofing your firm*

## 42 INDUSTRY ANALYSIS

On the horizon

**Jessica Brown**, customer education director at **Thomson Reuters**, explains why firms must always be horizon scanning to stay ahead of the game

## 44 CASE STUDY

Starting strong

**Johanan Tang**, office manager and financial controller at **Euclid Law**, says **Clio** helps the firm stay focused on its growth and committed to clients







# ON THE HORIZON



Jessica Brown, customer education director at Thomson Reuters, explains why firms must always be horizon scanning to stay ahead of the game



In the constantly changing legal landscape, it's more important than ever for legal professionals to have their sights on the future of their field. This includes anticipating changes in the law and the effect they could have on how they operate, as well as how their clients and regulators operate. Horizon scanning has become an essential part of how lawyers work, enabling them to better identify, prepare and anticipate legal developments, implementations and changes in legislation.

This seems to present a useful opportunity for defining what is meant by horizon scanning, and to take a closer look at some sample processes, key features and tools available to firms in this area.

The starting point is to explore the important distinction between current awareness and horizon scanning, something that can occasionally be overlooked. Current awareness is understood as being about what is happening today, tomorrow and next week – it's the 'right now'. In contrast, horizon scanning is about looking at what we need to be aware of to plan for success. It's about the view of the next 12 months and beyond. My favourite analogy is to compare a newspaper (current awareness) with an almanac.

## CASTING A WIDE NET

In addition to this general definition of horizon

scanning, it can be further refined to distinguish between two types. The first can be referred to as a 'wide net'. This is the comprehensive, sustainable, quick and automated approach to horizon scanning. It's impossible to know which developments may have an impact, so you need to be sure you can catch them all. A new piece of law may have an impact for a seemingly unlikely practice area, or test cases could turn into class actions. The wide net enables you to be certain that you are capturing all the information you need to allow for any possible developments.

This is sometimes very challenging, as there can be so much information to cover with little indication of what might be important. Newspapers, blogs, current awareness feeds and new publications can mean there are thousands of entries to scan, analyse and compile.

Without a dedicated team or tools to assist, this can be a daunting prospect indeed. Paid-for services such as Practical Law, Westlaw UK and Lawtel all have wide current awareness feeds indexed by sector or practice area for easy and relevant consumption.

You can get practice-specific feeds from free sites as well. The government's website allows you to sign up for email alerts or RSS feeds by department and topic. You can also search for content and filter these searches by type, such as press releases or speeches.

In addition, The National Archives manages a



#### ABOUT THE SPONSOR

**Thomson Reuters** delivers best-of-class solutions to help legal professionals practise the law, manage their organisation and grow their business. Our solutions include Practical Law, Westlaw UK, Contract Express, Drafting Assistant and Firm Central.

[legal-solutions.co.uk](http://legal-solutions.co.uk)



website on behalf of the government, which allows you to create basic feeds of newly published and draft legislation.

You can also receive email alerts from publication websites and Thomson Reuters Legal Insights UK & Ireland.

If you are responsible for this form of horizon scanning, as well as choosing your content, find a process that works for you. Some prefer to receive daily emails and feeds, file them into a convenient inbox folder and then go through each one in turn, picking out key trends.

#### STAYING SHARP

The second type can be referred to as 'sharp focus' horizon scanning. Once a trend has been identified, the sharp focus is about how you track this moving forward. It is about making sure you can understand the potential scope and impact of a trend. To be able to do this effectively, you need to be sure that you are using key trusted commentary and expertise, avoiding information overload. Sharp focus is also about being able to access relevant analytical information on a trend in a timely and flexible way.

Also important is the need for easy dissemination of this information. It will need to be able to be automated and repeatable,

and presented in a flexible format as different people will have different needs and aims.

#### SME TIME

When SME firms talk to us, their primary focus is their immediate caseload, client retention and acquisition, and the development and running of the business side of things. Serving existing matters and profitably remain core concerns. These firms increasingly need to work harder, faster and smarter to deliver to the client – as well as addressing the challenges of profitability and cashflow. The core focus must be on resolving clients' immediate and current problems. Horizon scanning to keep an eye on the future for planning comes second.

For the majority of SME firms, their key differentiator is people: their specialisms, capabilities and the personalised service they can offer their clients.

Developing these people and equipping them with the ability to anticipate future challenges and identify potential obstacles enables them to remain a trusted partner to their clients as well as re-engage with former clients.

Positioning your firm ahead of the curve, adding value to clients and being a thought leader – not a trend follower – is no longer an optional exercise. **LPM**

# STARTING STRONG



Johanan Tang, office manager and financial controller at Euclid Law, says Clio helps the firm stay focused on its growth and committed to clients

As a very young law firm, Euclid Law wants to make the absolute most of its first few years of action.

A boutique competition law firm based in London and Brussels, it prides itself on being “focused, flexible and independent” – core values in terms of the way the firm works and how it presents itself to its client base. And Euclid Law needed technology that falls in line with these values and strengthens both its delivery of legal services and position in the market.

Johanan Tang, office manager and financial controller at Euclid Law, says the firm aims to blend agile startup mentality with traditional professionalism. Tang says the firm’s commitment to nurturing existing client relationships and attracting new ones remains a priority for the partners.

“We’ve been active for three years now, and the main goal is to continue to grow and confirm our position as one of the top competition boutiques in London and Brussels.”

All firms need to invest in the right technology to support them in their strategic growth objectives. Tang knew that his firm needed to improve its practice management support in order to stay focused on its ambitious goals in these early years.

## CLOUD CONFIDENCE

Taking on a practice management system was a no-brainer, says Tang. “When we first started, everything was very manual. Management had to keep a close eye on everything on a day-to-day basis, but as you grow as a firm it’s more and more difficult to do that. We reached a point where we really needed to automate some of our processes and make our lives easier.”

He reiterates that it became increasingly challenging to keep track of cases manually as the firm took on more work, and management also grew concerned about the potential for masses of paperwork lying around, most of which would contain sensitive information.

The cloud solution offered by Clio provided the firm with the secure platform they sought. Tang stresses the importance of all employees, across a firm with offices in London and Brussels, having access to the same information – which the cloud also facilitates.

“You don’t need to worry about where to find or save something. You can pull up reports or access information, whether you’re on the road or meeting a client,” he says. “You don’t need to go through a dozen processes and contact three people before receiving something two hours later. It’s helped save us time and it’s the way most firms should be working.”

“As we take compliance with General Data Protection Regulations and our other regulatory obligations very seriously, Clio also helps us to operate in a way that is both lawful and secure,” says Oliver Bretz, director and founding partner of Euclid Law.

With the idea of transparent communication between firms and clients on the rise – and for firms to make better use of information internally themselves – Tang says that Clio’s system also helps to keep everyone on the same page.

“Having a protected exchange tool for our clients is a big plus for productivity. We can create new documents and folders very easily, share them with anyone we need to, but also maintain control at our end.”

The communication tool, Clio Connect, allows for instant and easy communication with clients. “Clio Connect is especially useful when we need to share a big folder in a short period of time with a client, wherever that client may be in the world,” says Tang. “It’s very quick and efficient.”

However, the firm’s clients can also be confident that their sensitive and confidential information is protected by Clio’s ongoing investment in highly secure cloud infrastructure, he says.

## WHO’S GOT THE TIME?

Another essential for a law firm is timely and accurate billing. Tang reports that Clio’s time-



## LPM FIRM FACTS

**Euclid Law****Revenue: £1.8m****Corporate status: Limited****4 fee earners, 7 total staff****Office location: London, Brussels**

The firm has been using Clio for just over a year now, and Tang claims that everyone can already see the difference in efficiency. He pegs his own time saved on manual processes at roughly 50%, freeing him up to concentrate on more productive working elsewhere.

And when it comes to the upfront cost of software, he says Clio's is competitive. "There are more expensive alternatives out there. A cost is a cost, but it's not huge, even for a small law firm. It's a sensible investment because of the range of business benefits it brings."

## KEEPING EVERYONE TOGETHER

However, efficiently bringing everyone up to speed with understanding how to navigate the system is essential when introducing any new software to a business – to reap the return on investment as early as possible.

Tang explains that, whether based at the London or Brussels office, everyone in the firm is fixed up with a Blackberry. Clio is installed on all devices so that employees can access software anytime and anywhere, including for training purposes.

"We had training with Clio's team, and also hosted a brainstorming session for everyone in the firm to raise their feedback and ideas," he says.

The relationship between the firm and Clio is well connected, says Tang, and the latter is always quick to respond if there's a glitch. "They always forward our feedback to their research and development team for consideration of future improvements, and then try to implement those in the longer term."

Tang says that the firm aims to maintain a blend between flexible, startup mentality and high professionalism, with a focus on client relationships. Software that matches this can only improve efficiency as it continues to grow in the future. **LPM**

### ABOUT THE SPONSOR

**Clio** is a cloud-based legal case management system that is optimised to meet the needs of small to medium-sized firms.

[www.clio.com/uk](http://www.clio.com/uk)



keeping and billing tool is a clear highlight among the partners. Fee earners can easily log and track the billable time they've spent, and others at the firm can also access those reports. If something comes up that takes them off a task, a fee earner can simply pause the clock and resume later, he adds.

"It's very easy to use, with all the bills in one place, so you don't need to think about tirelessly keeping an up-to-date spreadsheet stored on your desktop.


"One of my own favourite features is the time-reporting tool. You can easily generate a PDF report, or any other file format, on time spent and other important information pertaining to a matter."

# 6 OF THE BEST ECO-INSPIRING SME FIRMS




**D**rawing on data from the Legal Sustainability Alliance's (LSA) annual report for 2018, LPM looks at which firms are doing the most to try to reduce their impact on the environment. We ranked the reporting SME firms in five categories: change in total carbon emissions, change in carbon emissions per employee, change in total associated tonnes of CO<sub>2</sub> emissions for both water and waste, and change in paper use (in tonnes). Then, we averaged those scores to calculate our own overall ranking for our planet-friendly practices. For illustrative purposes, two out of the five chosen categories are shown below.

**1 ACUITY LEGAL**  
LOCATIONS London, Cardiff, Swansea




|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -52%                             | -59%                                    |

**2 WATSON BURTON**  
LOCATIONS London, Leeds, Newcastle




|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -31%                             | -14%                                    |

**3 LANYON BOWDLER (JOINT)**  
LOCATIONS Shrewsbury, Bromyard, Conwy, Hereford, Ludlow, Oswestry, Telford




|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -10%                             | -14%                                    |

**3 HIGGS & SONS (JOINT)**  
LOCATIONS Brierley Hill




|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -22%                             | -22%                                    |

**5 PARIS SMITH**  
LOCATIONS Southampton, Winchester



|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -17%                             | -32%                                    |

**6 LYONS DAVIDSON**  
LOCATIONS Bristol, Cardiff, Edinburgh, Leeds, New Malden, Solihull



|                                  |   |
|----------------------------------|---|
| TOTAL CARBON EMISSIONS % CHANGE: | CARBON EMISSIONS PER EMPLOYEE % CHANGE: |
| -21%                             | -9%                                     |

## THANKS A TONNE

How are firms changing their habits to become more paper-lite?

**ACUITY  
LEGAL**  
-58%



**WATSON  
BURTON**  
-53%



**MDY  
LEGAL**  
-33%



Difference (in %) of tonnes of paper used from 2016 to 2017

*About the report:*  
Founded in 2007, the LSA aims to push for positive action on climate change by measuring, reducing, and reporting on their carbon footprints. This year's report features a record-breaking number of firms reporting along with a summary of each firm's carbon footprint.

# LPM

LEGAL PRACTICE MANAGEMENT

ONE GREAT CONFERENCE  
THREE GREAT CITIES

LONDON | BRISTOL | LEEDS

THE ONLY EVENTS FOR SENIOR  
MANAGERS IN SME LAW FIRMS

"I FELT THE CONFERENCE WAS COMPLETELY BRILLIANT, VERY ENGAGING AND COMPLETELY RELEVANT TO THE CURRENT BUSINESS NEEDS OF MY FIRM. I SHALL BE DELIGHTED TO ATTEND NEXT YEAR AND WILL ENSURE MY DIARY IS FREE TO DO SO. THANK YOU ONCE AGAIN TO YOU AND YOUR TEAM FOR ORGANISING SUCH A GREAT EVENT."

Melanie Knight, practice manager, Humphries Kirk LLP

Conference partners:




BOOK NOW

[LPMAG.CO.UK/LPM2019](http://LPMAG.CO.UK/LPM2019)

CALL 0870 112 5058

EMAIL [EVENTS@LPMAG.CO.UK](mailto:EVENTS@LPMAG.CO.UK)



# Concerned about Cybercrime and the implications for your practice?

WE HAVE THE SOLUTION...

CYBERCRIME & DATA *PROTECT* HAS BEEN CREATED TO INDEMNIFY AND ASSIST LAW FIRMS FOLLOWING A CYBER INCIDENT.

In the event of a cyber incident or breach, a dedicated breach response team will provide assistance as well as ensure compliance with notification and regulatory requirements. Our incident/claim notification process is simple, available 24 hours a day to triage your notification and make contact with the relevant breach team.

It is essential that experts respond immediately following a cyber event.

DISGRUNTLED  
EMPLOYEE COVER

LOSS TO  
OFFICE  
ACCOUNT

INTERNET  
MEDIA COVER

PRIVACY BREACH  
EXPENSES COVER

BUSINESS  
INTERRUPTION  
INCLUDING FEE  
PROTECTIONS

DIGITAL  
ASSET COVER

**Cybercrime & Data***Protect*

REGULATORY  
FINES AND  
PROCEEDINGS  
COVER

PRIVACY  
LIABILITY COVER

NON  
TARGETED  
ATTACK  
COVER

NETWORK AND  
DATA CYBER  
EXTORTION COVER

NETWORK  
SECURITY  
LIABILITY COVER

CRISIS  
MANAGEMENT  
AND INCIDENT  
RESPONSE  
TEAM

Our UK Professions team provides insurance broking and risk management solutions to law firms in England & Wales. We arrange cover for firms of all sizes, ranging from Top 100 to sole practitioners

For more information contact our team on:

(0) 20 7280 8259 | [CyberProtect@paragonbrokers.com](mailto:CyberProtect@paragonbrokers.com)



Paragon International  
Insurance Brokers Ltd

140 Leadenhall Street  
London EC3V 4QT England

T +44 (0) 20 7280 8200  
F +44 (0) 20 7280 8270

[www.paragonbrokers.com](http://www.paragonbrokers.com)

Authorised and regulated by the Financial Conduct Authority. Accredited Lloyd's Broker  
Paragon Brokers (Bermuda) Ltd 27 Reid Street, Hamilton HM11, Bermuda. Registration No. 33838