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How can SME law firms get their IT off the shelf and used to its fullest?

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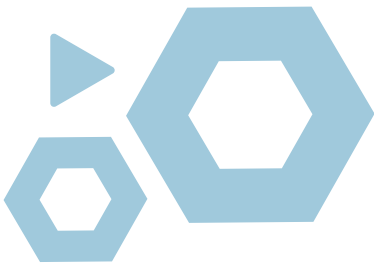
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TIN WINS

The dreaded IT shelf-dweller – it's sought and bought without a thought. And it needs to stop. Businesses need to learn how not to get bugged down by their IT systems. Learn how to coexist, it's there to work for you after all.

What are the easy wins for SME law firm technology? Lucy Treveylan investigates how firms can lay the foundation for their businesses using IT. It can be hard, no matter how small your outfit, to get people to adopt and use technology to the fullest. Where are the holes and how can you fill them?

Kayli Olson, acting editor
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About us

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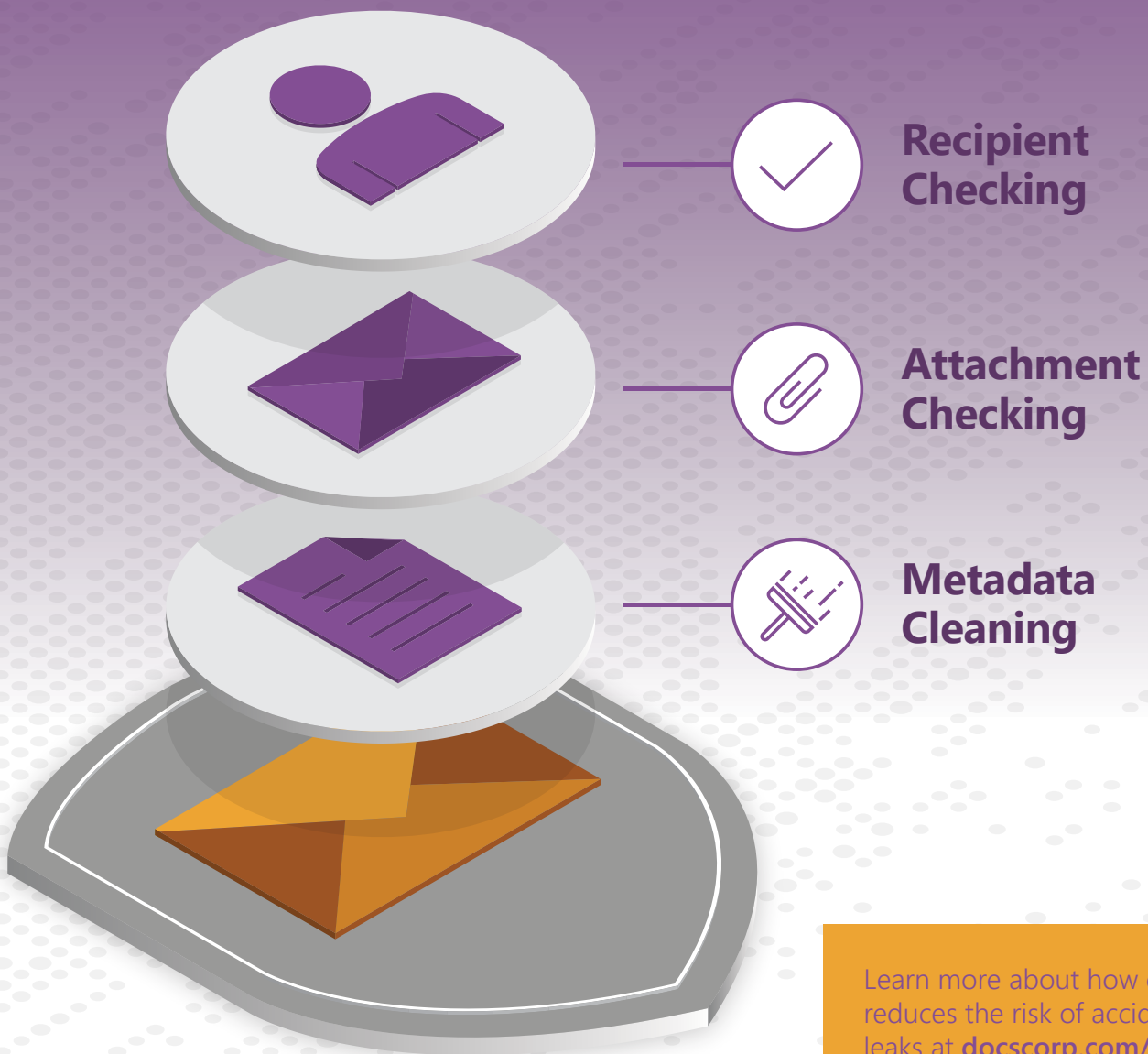


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ROI BEING SERVED?

Are SME law firms prioritising the right technology purchases to make them more efficient and competitive and are they making the most of the technology they already have? Lucy Trevelyan reports.



There's currently much excitement about tech innovations available to help law firms improve efficiency and productivity. Indeed, according to Law Society research, productivity growth in the legal services sector could double by 2038 owing to an increase in automation and the adoption of artificial intelligence (AI).

The hype surrounding AI, however, appears to have failed to capture the imaginations of SME law firms, with 73% of respondents to LPM's Legal IT landscapes 2018 report saying they weren't using it. The study also showed that on a scale of one to 10 for 'how automated' legal work is across firms, respondents reported a median of three. That falls short of how automated they thought their firms could be – seven out of 10.

"Law firms tend to be behind the curve and can be slow to invest and understand the importance IT can play in not just winning new business but maintaining and developing existing clients," says Ian Burrell, IT director at Ellisons. "Technologies such as automation, document management systems (DMS) and communication tools can make law firms accessible to all their clients, increasing the flexibility of services they offer."

If you consider the traditional setup of a firm and the costs of maintaining filing cabinets and archives, technologies such as DMS can make this easy and can allow external clients to access their files, he says. "Tools like automation make the delivery of certain types of business available through websites and can result in pieces of work being delivered to a fixed price as costs are closely managed."

DIGITAL DAYS

Digitisation is obviously a current hot bandwagon some firms are enthusiastically jumping aboard to reduce costs, improve access and maximise space. However, focusing on digitising alone is too narrow, warns Rob Heaton, head of operations at Carbon Law Partners.

"We look at how much it costs in the full sense to deliver service and seek process and operational efficiencies. Often that does involve deploying an application or a tool or a workflow, but not always. We must remember not to see technology as a panacea to fix everything."

What is digital and therefore revolutionary to one firm may be common practice to another, and there's an element of return on investment, agrees Alan Barrett, head of IT at TWM Solicitors.

"We try to adopt technologies as they mature, at a fast enough rate to make the fee earner's life easier or the firm more capable. We don't have specific targets around this concept – I feel targets may have the negative effect of forcing

you to digitise something which might be best left alone until the technology matures."

The most strategically significant technology for a law firm depends on what sector they are in, says Mark Briegal, head of professional practices at Aaron & Partners. "A niche firm that has a high volume of clients and cases, such as personal injury or conveyancing, will need tip-top practice management systems to minimise solicitor input. This will help control process and flow, and allow client monitoring. A specialist M&A firm will need DMS, whereas a litigation practice will need software to help with flow and cost budgeting."

But there are multiple systems and capabilities that law firms are missing out on, such as electronic ID checking, digital signatures and finance systems, he says. "Voice recognition dictation is useful, as is document comparison for big projects – these tools definitely help efficiency. Unfortunately, systems such as AI due diligence are probably still too expensive for SME law firms."

Platforms which provide access to a range of applications in a coherent and integrated way are key technologies for SME law firms, says Heaton at Carbon Law.

"The interaction of different applications is a key objective rather than multiple standalone applications that don't 'talk to each other'. Every firm needs a core platform – the place lawyers and support staff go every day to do what they do and to interact with clients. That platform must connect to the applications needed to operate in today's world – finance systems, practice management or workflow systems, knowledge management, communication and client management and marketing."

Gina Connell, infrastructure director at BP Collins, says the holy grail for many firms is a holistic view of clients, having all data available via one system.

"This area will continue to grow as the market changes and disruptive technologies such as AI make an impact. Other efficiencies such as digital signatures can make a big impression too. This dovetails with paper-light and eco-projects, saving firms considerable sums in both printing and storage costs."

“Every firm needs a core platform – the place lawyers and support staff go every day to do what they do and to interact with clients.”

Rob Heaton, head of operations, Carbon Law Partners

LPM FIRM FACTS

Ellisons

Revenue: £13m

Corporate status: Partnership

97 fee earners, 200 total staff

Offices: Colchester, Chelmsford, Ipswich, Tendring

LPM FIRM FACTS

Aaron & Partners

Revenue: £9.6m

Corporate status: LLP

76 fee earners, 131 total staff

Offices: Chester, Shrewsbury and Manchester

LPM FIRM FACTS


TWM Solicitors

Revenue: £16.2m

Corporate status: LLP

107 fee earners, 235 total staff

Offices: Guildford, Cranleigh, Epsom, Leatherhead, Reigate, Wimbledon, Fulham



“It’s all about aligning with the business strategy to ensure the intended business improvements follow the technology improvements.”

Gina Connell, infrastructure director, BP Collins

KEY TECH

Barrett at TWM Solicitors says that for many within his organisation, security is the single most difficult technology to get to grips with, owing to the unknown quantity of “how secure is secure” and where money would be best spent.

“For others, mobility is the key – ‘I need to work anytime/anywhere’ – while downward pressure on costs and the refreshing of IT estates makes it into the top three for those with a financial leaning in their priorities and who favour putting cloud adoption high on the agenda. This is an interesting time in IT management, as strategically IT needs to deliver all of these improvements on far tighter timescales.”

When deciding what needs to be ‘fixed’ first on the IT front, says Barrett at TWM Solicitors, most firms should now be adept at providing a reasonable computing experience for their user base and it then comes down to your short, medium and long-term planning.

“We work on a principle of trying to anticipate and eliminate issues before they become issues that could cause our end users to suffer, and therefore it’s all about aligning with the business strategy to ensure the intended business improvements follow the technology improvements.”

The requirement to either be more efficient or save costs to deliver a better service informs business decision-making, says Connell. “There is always a tipping point where a firm needs to

upgrade technology or risk a reduction in competitiveness, and these rolling projects can have managed timelines. Additionally, a cost-benefit analysis, coupled with the resource and time required on other projects, drives our business decisions and priorities. Sometimes, a short project can deliver a quick win so it may take priority over a project that needs to run for months.”

BP Collins undertook a transformation project on IT and replaced five applications with one system encompassing CRM, billing, time recording, matter and practice management – and Connell warns that the change management aspect of such a project should never be underestimated.

“It should run for a long time before and after a go-live date, to engage people on the journey. Every firm should get the Kübler-Ross change curve business model out at the start of a project and map the journey to enable them to deal with challenges to understanding and positivity.”

SME firms are historically likely to have lacked the partner commitment to sufficient IT spend, despite the enormous efficiency gains available, says Heaton. “However, that might turn out to be an advantage as tech is cheaper now than it was five years ago, and there’s more of it. Being late also means missing some of the early adopter challenges in what have become core systems and applications now.”

Firms, Connell says, tend to underuse the

FINDING NEW FINANCE

The days of funding big IT projects directly from partners' pockets are long gone, says Gina Connell, infrastructure director at BP Collins.

"Leasing rather than purchasing has become the new norm. Firms are moving to software as a service and this can greatly reduce costs. Depending on the size of investment, some firms are seeking external investment either through private investment or on the markets. There are many sound financing options and each one has its own merits, which firms need to consider in the context of their strategic goals," she says.

There is no substitute for a good old-fashioned budget, says Rob Heaton, head of operations at Carbon Law Partners, although the mistake is often in not providing the resources – whether time or talent – to properly understand the specification.

"Whoever specs out what your tech needs are needs to understand the firm's business objectives clearly and where the firm is headed over the next two to three years. Longer is folly as so much will change over longer horizons in a rapidly evolving market. A clear view of where the firm is today will

assist in prioritising the inevitable change programme and the associated spend."

'Buy not build' is also key as very few SME law firms have the capability to build their own, never mind to scale and maintain systems, he says.

"That decision of itself should mean lower overall costs to deploy and maintain. In some situations 'buying groups' of firms may result in discounts, but this is an underdeveloped area and perceived competition acts against this."

Recent law firm mergers, listings and private equity backing shows that there are alternative ways of financing investment beyond internal and bank financing, although these latter still remain the favoured financing option, says Abby Winkworth, business development director at IBB Solicitors. "Resourcing takes the form of IT directors in very large professional services firms who are downsizing and offering consultancy services, using their considerable experience to great effect on the SME legal market."



'business intelligence' that is contained in their systems. "Often, the information is viewed in silos depending on the business function that is looking at the information. Drawing all that information together enables firms to better understand what they are doing well and where to focus their efforts. In the current market most firms are making changes, as they recognise the dangers of ignoring the changes in the legal landscape."

CASE CLOSED

Firms could make a lot more of their databases to communicate the key benefits of having a closer relationship with their solicitor to clients and how they could help in other aspects of their life or business, says Barrett at TWM Solicitors. "Of course, knowing how to do that is the 'dark art' of effective marketing, but it all starts with

"Simplification of the billing system offers the chance to improve cashflow. I was using it 10 years ago, so when firms aren't using it even now I do have concerns about their entire approach."

Paul Bennett, employment law partner, Aaron & Partners

effective database mining."

As an adviser on anti-money laundering to the SME market, Paul Bennett, employment law partner at Aaron & Partners, says he is also surprised at the low level of electronic verification being used. "It is so simple to use and ought to be adopted. One-click billing is another key option. Simplification of the billing system offers the chance to improve cashflow. I was using it 10 years ago, so when firms aren't using it even now I do have concerns about their entire approach."

A key problem, says Burrell at Ellisons, is that often a new device gets used like the last. "For example, a laptop replaced by a surface pro just gets used like a laptop. The new device is touch screen, can be written on and operates in different modes to suit working styles, but from the user perspective you end up treating it like the last device. When you get a new phone, how often do you just use the same apps and services as the last, never looking closely at the new features each upgrade brings?"

His firm, he says, supplies YouTube videos showing the capabilities of devices, as this is more powerful than a "watch me do it all" demo. "These videos have the great advantage of being available wherever you want and can be watched as many times as you want. Staff do not always ask all the questions they want for fear of appearing difficult or stupid."

For firms to make the most of the systems they already have, ongoing and repeat training is key,

LPM FIRM FACTS

Carbon Law Partners

Revenue: Undisclosed

Corporate status: Limited company

30 fee earners, 42 total staff

Offices: Cardiff, London, Bristol, Birmingham

LPM FIRM FACTS**BP Collins****Revenue: £8.4m****Corporate status: LLP****56 fee earners,
99 total staff****Offices: Gerrards Cross****LPM FIRM FACTS****IBB Solicitors****Revenue: £19m****Corporate status: Traditional
partnership****90 fee earners, 225 total
staff****Offices: Uxbridge, Chesham**

says Heaton at Carbon Law.

“Train, train and train again. Overall efficiency is about improving the lowest common denominator. The route to this is to consult the users of systems – the lawyers and support teams – as part of the design and build process, to understand them as your customer and to coach them along a change journey.”

Getting your users to get the most out of your current system requires much interaction between IT at all levels of the firm, says Barrett.

“Not only does IT need to be approachable about short-term ‘it doesn’t work’ issues, they also need to be deeply embedded in the firm to ensure all business decisions have taken the IT aspect into consideration. We try to treat all IT projects that affect users as business projects, and therefore feedback is important to us as we progress through the testing and installation phases. If at the early stages the users can’t see the benefits of the upgrade, you’ve already lost the battle.”

Giving people control of the system and the information they need to do their job is the best way to gain uptake and understanding, says Connell at BP Collins. “If a system goes live with too many ‘rules of use’ then that puts people off and they either won’t use it or, worse still, will start using something else.”

If adopting and using new systems is part of a firm’s DNA, they will be used, says Briegal, but conversely, if senior people are allowed not to use systems, because they don’t want to, these systems won’t be universally adopted.

“Training is key and it must be based on users’ experience, accepting that there will be a wide range of skill levels across the firm. Each team or department should have a skilled super user, who the team can ask how to do something and can offer immediate advice.”

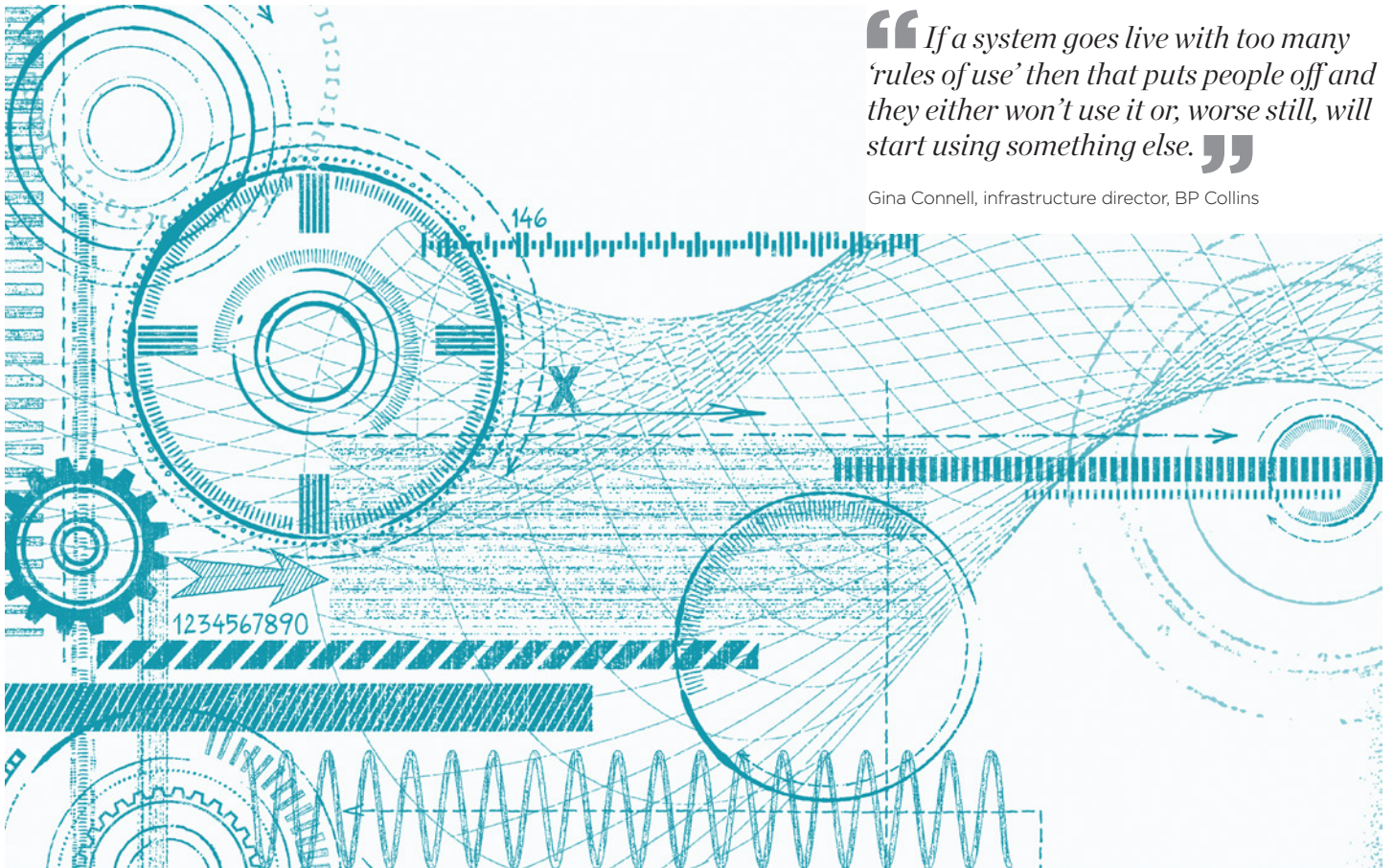
If you are training in groups, advises Bennett, ensure the keen adopters are in the first group, then keep the sceptics until the end. “This should ensure there will be fewer barriers to adopting the new process.”

Having a clear vision of what you are seeking to achieve, and being able to articulate how the solution aligns with the vision and the strategy, helps take-up enormously, says Abby Winkworth, business development director at IBB Solicitors.

“We have a long-established programme of talking to all our people every six months, and updating them not only on how well we’re doing, but also about our performance on strategy, the threats we perceive, and the solutions we are recommending. This leading from the top, very visibly, is essential for the behaviour change we are looking for,” she adds. **LPM**

“If a system goes live with too many ‘rules of use’ then that puts people off and they either won’t use it or, worse still, will start using something else.”

Gina Connell, infrastructure director, BP Collins





DOT ON THE HORIZON

Richard Roebuck, managing director at Accesspoint, tells a story of an SME law firm failing to get to grips with its IT and what your firm can learn from it

Firms often look to stories of success to learn new ways of working, but perhaps most hard-hitting would be to learn from the firms that fail.

Good technology is the basis of any well-functioning business in the 21st century – as competition becomes tighter with new technology capabilities, now really isn't the time to be sitting on your laurels.

The ramifications are huge, says Richard Roebuck, managing director at Accesspoint.

“When the wheels come off and things go wrong, it's quite serious. For law firms, especially in the SME market, failing to get technology aligned correctly may prove to be fatal to business.”

Technology now plays an integral part in a business's success. With the competitive edge these days, efficiency is absolutely key, he says – and if people aren't willing to adapt their ways of working, they may not be the right people for your business.

SORDID STORY

Many of the problems in IT stem from similar areas in different businesses – the story is not new. 95% of the reason this particular firm



“When the wheels come off and things go wrong, it's quite serious. For law firms, especially in the SME market, failing to get technology aligned correctly may prove to be fatal to business.**”**

couldn't stay afloat is because of a failed approach to technology. It's as simple as that, says Roebuck.

“Two years ago I got involved with a firm from more of a human side as opposed to the IT side. I was friends with the person at the top.” We'll call them 'Anon'.

“Anon was being fishy about the market – money was tight and all of the usual stuff. The firm's IT system was inadequate and vastly underutilised compared to what a lot of other firms were doing.”

Anon decided to go off into the marketplace to buy a new system. Roebuck says big mistake number one is the firm didn't approach or take enough interest in the transition between old and new systems as it should have.

Anon therefore didn't put the backing and support around the project that was needed – the only person who was put on the job later turned around and left the firm. This situation was then worsened owing to lack of buy-in and understanding from the firm at the outset.

And on top of this, there was a set of circumstances around the business at that moment in time and things were a little bit tight as this firm was doing a lot of legal aid work, Roebuck says.

“The transition to the live system didn't really go as it should have done. Training was inadequate and Anon pushed staff into new behaviours.”

Unsurprisingly, there was push back from the firm. Roebuck says big mistake number two was an ingrained cultural problem. Staff wanted to do it their way, because they knew best – this made the technology implementation very difficult.

The firm never really got up to speed over the next two years and so, to this day, Anon got themselves into a state where the housekeeping is still very manual, he adds.

“It's 2018 and I see it all too often. Firms are doing things by hand when they really don't need to,” he says.

There' are about 3,000 paper files kicking around the place – Anon couldn't, even now, print a list off a system that showed them the caseload, Roebuck says. But what's worse is that these 3,000 cases reported live on the previous system and half of them had outstanding working progress on unpaid disbursements – but only about 700 of these case were actually live.

“Administratively speaking, Anon had a huge exercise to undertake to deal with all of that. He ended up writing off X, Y, Z amount of work in progress – which was obviously affecting his bottom line. In reality that WIP, with over two-thirds of its caseload, was actually fiction. If Anon didn't know that, they didn't want to know and if they did know, they didn't want to.”

It seems that everything that could go wrong, did. But actually, Roebuck says, this isn't as uncommon for firms in the SME market as one might hope.

BAD FORM

Quite often, firms end up having a few bits and pieces of old systems, acquired either through mergers or hapless buying, and bringing it all on leads to a mismatched and incomprehensible setup – it's important to stop and think things through.

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Firms spend huge amounts of money to put in the right technology but then fail to use it correctly. Roebuck says many SME firms are still choosing to make use of site-based hardware – servers which often sit unprotected in a corner under the filing cabinet.

But it's counterintuitive, he says. "Why would you go and spend a quarter of a million quid, or the lion's share thereof, to rebuild your internal network and update your software when the cloud is right in front of you?"

"You can move on a fixed fee if you like, X per seat per month and you can factor that into your budget and move on with work."

To go back to the 'sordid story' firm, Roebuck says it's in a situation where over the last 24 months, hardware has essentially ground to a halt, and Anon's got £120,000 worth of software with a platform that isn't capable of running it.

"Cloud is the way forward. It's one of the reasons why I started Accesspoint. And with the fundamental shift taking place in legal aid right now, how is a firm like the example I've given ever going to afford to maintain these levels of investment in software upgrades, whether on the latest versions of Office or anything else over the

“ With the fundamental shift taking place in legal aid right now, how are firms ever going to afford to maintain these levels of investment in software upgrades ... It seems impossible to me. Cloud isn't a buzzword – it's a business life-saver. ”

next decade? It seems impossible to me. Cloud isn't a buzzword – it's a business life-saver."

SME firms are up against much larger organisations that can build their own infrastructure if they want to – cloud enables SME firms to access the same capabilities. So, Roebuck says, he finds it difficult to understand why any SME firm would contemplate going out and buying new hardware – yet they do, day in day out.

“It’s old-school thinking. And this is more likely to happen when you have lawyers running the show. They’re not business people, as much as they might like to think they are – they won’t approach this from a business angle. And they’re not IT people – they’re a little scared of it.”

He says there’s a philosophy that whatever the firm buys, it’s an asset, it’s going to sit there and it’s on the balance sheet – but, it’s also depreciating over the years; £100,000 worth of hardware today is worth zero in two years.

We’re seeing that in the market right now, he adds – everything is end of life. And many SME law firms don’t have in-house IT teams, so they’re really chasing their tails when they invest in hardware. “But of course, I would sell cloud because I’m the cloud man. Unfortunately I feel like that’s what many decision-makers are thinking when they talk to me,” he says.

Accesspoint puts hundreds of thousands of pounds into its new hardware – it forms a significant part of the budget, Roebuck says. Accesspoint does this so its clients are always on the most up-to-date systems available. An SME firm can’t afford to do that regularly.

“Cloud is a utility; rent it and move on,” he says.

WHAT POINT?

It’s hard to buy a bad practice management system (PMS) these days, says Roebuck. Implementing a PMS correctly and having the right culture for change means that firms won’t turn out like the firm in his example.

“The majority of SME firms, without a doubt, use less than 70% of the available functionality in the PMS,” he says.

So, how should firms go about having a strategy around their IT? Roebuck says have a dot on your horizon.

“If you consider the horizon and you’re looking at it, you’re just looking. Now if you put a dot on the horizon, you can walk towards it. It doesn’t matter if you move the dot to the left or to the right, that’s your technology shift and other changes in the market. All that matters is that you have something you can aim for – and that comes from developing the right strategy.”

Consider what the implementation plan looks like now, roadmap it, know how it fits into the collective business strategy over the next year to two years, he says.

“Failure to get to grips with your IT systems and platforms can see you going out of business. It’s a harsh reality but that’s the sort of environment we work in now.”



Roebuck says start by finding the right IT partner – don’t just go out and buy. It’s got to be someone you believe in and who knows the market and will share your vision with you. Next, understand that you need to put the right underlying infrastructure in place – future-proof yourself, get your cost model right and understand what your fixed underlying IT costs are, and take it toward the cloud.

“Once you have your environment sorted, along with all of the peripherals like email, then you can move to PMS. What do you want it to do, and what does the growth trajectory look like for the business?”

There’s a lot of ongoing commitment required to continually develop the software applications and processes, Roebuck says. It’s neverending.

Firms will get the most value out of their software not hardware; the rest of it is investment of time and money in developing it to run your business for you, he says.

“Failure to get to grips with your IT systems and platforms can see you going out of business. It’s a harsh reality but that’s the sort of environment we work in now.” Firms must continually develop, invest and use them to the fullest, he says – because if you’re not doing it, your competitors are. **LPM**

ADAPTING MINDS



Lucia Sandin, senior marketing executive at Thomson Reuters, asks what law firms can learn from the psychology of change management

Implementation of major initiatives, new processes or technologies, such as changing how a firm creates contracts, often means a huge shift in mindset for some lawyers, and getting this right is crucial for success. Change like this doesn't just happen – it needs a strategic approach and buy-in from stakeholders.

Much has been written about the need for organisations to innovate, change and adapt to stay competitive. What is often lacking, however, is a closer look at the practical realities of these changes.

Increasingly, organisations are focusing on the human side of the change, and this is where the psychology of change management can offer some valuable insights. The need for change can result in industry-leading innovation, but in practice it's not always welcome internally. It often means people have to modify their ways of thinking and habits.

Change management as a formal process has traditionally been applied in the

corporate sector, but in any sector change is a complex process which warrants careful handling.

With an increasing number of alternative legal services providers hot on their heels and the traditional hourly billing model weakening, law firms are finding that market conditions have changed. Clients are no longer an unlimited pot, and the old model doesn't encourage the efficiency or transparency that clients now demand.

Legal professionals know that they need to adapt their way of thinking to new models, and law firm culture seems to be transforming from the traditional internal focus on lawyers' skills to an external focus on the client. In order for a law firm to move with the times, a change in mindset at an individual level across the firm is required.

One of the ways firms are transforming their business model is through document automation, for example. But successful implementation of this (or any other revolutionising technology) is dependent on change management.

Professional change management consultants advise that four principles are essential to consider for successful change management: understanding of change, reward system, education and training, and role models.

THE MEANING

If employees see the point of the change and agree with it, they're more likely to get onboard. Central to this advice is the realisation that change in behaviour starts within the individual, not with management or the individual's department or team.

If the individual doesn't believe in the overall purpose of the change, the employee will suffer from cognitive dissonance, where a mismatch in a



THE FOUR COMMON RESPONSES TO CHANGE

- CRITIC – Opposes change
- VICTIM – Panics
- BYSTANDER – Ignores change
- NAVIGATOR – Empowered by changing circumstances





TOP TIPS TO HELP PEOPLE BECOME NAVIGATORS

- Communicate the risk of not changing
- Involve everyone in decision-making
 - Ease uncertainty
 - Celebrate success
- Keep explaining the reasons for change

person's beliefs and actions leads to conflict and immobility.

If the organisation's goals surrounding the change are made explicit and reinforced, the individual's beliefs are more likely to align with those of the organisation, and behaviour will start to match.

People must also understand the role of their actions and believe that it is worthwhile for them to play a part.

THE CARROT

Any new behaviour requested of the employees needs to be accompanied by relevant recognition and reward systems.

It shouldn't be surprising that alongside any major change, adequate reward and recognition systems must be in place.

The 'stick' from the classic 'carrot and stick' approach seems to be the most common initial solution and may lead to a short-term change in behaviour, but it will not lead to the change in mindset that is essential for the long-term effectiveness of, and receptiveness to, any future change.

Employees will be more likely to work toward applying a change in behaviour if the law firm focuses on the 'carrot' by making explicit the change's rewards and personal benefits for individuals – such as new skills, a chance for advancement or participation in strategic goals – and if the recognition system highlights the opportunities of development and benefits specific to each individual.

THE LEARNING

The skills employees need to adapt to the change need to be prioritised. Part of successful change management is ensuring that employees are given the opportunity and adequate time to gain the knowledge that will facilitate the change.

If the organisation invests enough time and resources in training employees and makes this visible across the organisation, it demonstrates its commitment to this change.

Mishcon de Reya was aware of this (when implementing a recent change programme) and offered one-to-one training, if necessary, and got users to try it for themselves. It's human nature to default to old working practices unless people have practised using something new.

Training needs to be broken down into phases – first, instruction and listening, second, absorbing the information, third, experimenting with it, and fourth, integrating it with existing knowledge.

Too often organisations stop at step one. Using this cycle and considering employees'

“If the organisation's goals surrounding the change are made explicit and reinforced, the individual's beliefs are more likely to align with those of the organisation, and behaviour will start to match.”

feedback for potential improvement has many benefits – it increases bi-directional communication that's essential for the change to be successful and enhances the feeling of ownership in the process. Sarah Wilson, head of knowledge engineering at Pinsent Masons, says: “Feedback and requests for change quickly allow fee earners to see continual improvement and gain confidence and trust in the product.”

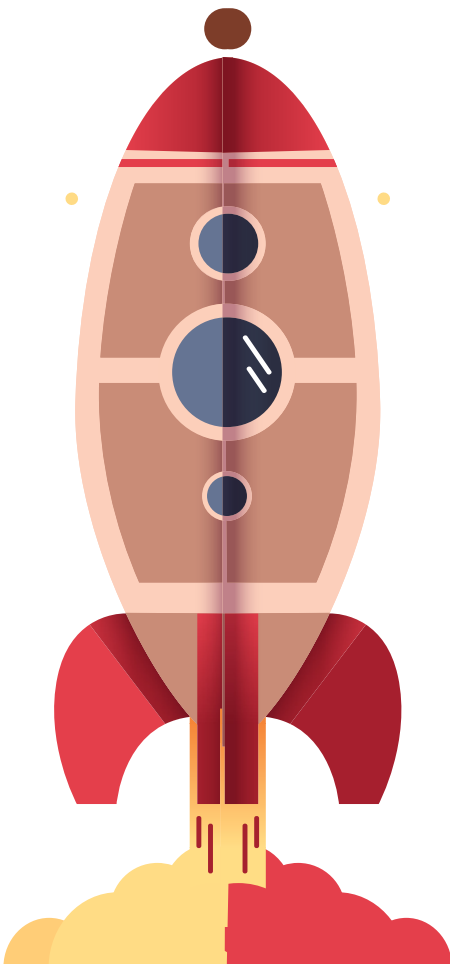
THE MODELS

Role models within the organisation also need to display the new behaviour. The adoption of this change needs to be demonstrated by all necessary people, including role models – in other words, the people in the business who are enthusiastic and can act as change champions to drive uptake.

It isn't enough to ensure that people at the top are in line with the new ways of working – role models at every level must 'walk the talk'.

Mishcon de Reya was aware of this when adopting Thomson Reuters document automation software Contract Express. “We chose our partner carefully, obtained support from the top and compiled a team across the business. Smart and enthusiastic staff in our information services team were trained to become specialists in using the software and worked with PSLs to re-engineer our precedents,” says Kate Higgins, legal director at the firm.

Individuals also match their behaviour with groups they identify with – if lawyers and staff see that their peers at the firm are enjoying the successes of this change, they



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will be more likely to move toward deploying it themselves.

At the end of the day, a law firm – just like any other organisation going through significant changes – can learn a lot from the psychology of change management and apply the principles above to successfully drive change.

While the firm's business strategy needs to reflect its external focus, it can't afford to forget the internal structures required to support both its strategy and its employees. **IPM**



TOP TIPS FOR SUCCESSFUL CHANGE MANAGEMENT

- Implement continuous improvement
- Create change navigators
- Communicate the threat
 - Involve the team
 - Minimise uncertainty
- Celebrate positive shifts

BIG CHANGE LESSONS FROM BIG FIRMS

Kate Higgins, legal director at Mishcon de Reya:

"Most law firms know that they need innovative change practices to compete, yet how best should they implement these change principles? At Mishcon, we have worked with Business Integrity to roll out Contract Express and its solution for smart contract drafting using a questionnaire. Looking back, most would agree that it has brought real benefits to the business." What lessons can be learned?

- **Create a vision** – Ours was to cut drafting pain, manage risk and improve staff retention.
- **Gather a team** – We chose our partner carefully, obtained support from the top and compiled a team across the business. Smart and enthusiastic staff in our information services team were trained to become specialists in using the software and worked with PSLs to re-engineer our precedents.
- **Pick some easy wins** – Start with the most commonly used documents, particularly any that require repetitive changes, to gain traction and learn while working on more complex projects.
- **Involve fee earners in testing** – You will obtain important user feedback and buy-in.
- **Train** – Engage with users one-to-one, if necessary, and get them to try it for themselves – it is human nature to default to old working practices unless they have practised using something new.

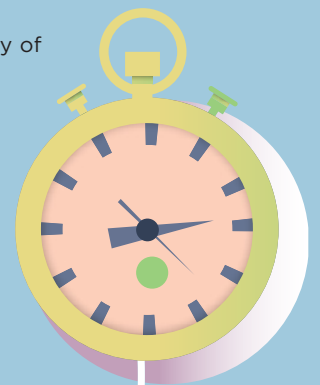
"Most importantly, jump in and keep the faith," she says.

Sarah Wilson, head of knowledge engineering at Pinsent Masons:

"Our experience has shown us that the best way of introducing change is to let the fee earners see the product in action (live demos rather than slides) and to ensure that there's involvement from the lawyers in developing and tweaking the product. Ensuring that there is buy-in at a very senior level is also very important so that a clear message can be delivered as to the objectives of the firm and how the new tool will meet those.

"It is vitally important to ensure that commercial language is used – for example, 'to improve the gross margin' – and that there is a message that will resonate with clients (and which lawyers can sell to clients). It always comes back to what the clients want and expect us to be doing.

"Finally, response to feedback and requests for change quickly allows fee earners to see continual improvement and gain confidence and trust in the product."



RETHINK DOCUMENTS



It's easy to get caught up in the latest technology craze and forget about the workflows that are the foundation of every firm's billable work. But, by reviewing and improving these workflows, you are innovating. Here's why, says Ben Mitchell, global head of commercial operations at DocsCorp



Can you imagine if we were still using a horse and cart to till a field, or sailing on a ship for 30 days to get to Australia? Innovation is inarguably good, but these days trying to keep up can feel a bit like being on a treadmill that never stops. However, to run a good race, you don't have to reinvent the wheel. By rethinking how you use the most basic, essential technology solutions every day, you can achieve real innovation.

When it comes to harnessing the value of technology, it's a matter of innovate or stagnate. Firms innovate by deploying technology solutions that make lawyers' and secretaries' jobs easier. But the more forward-thinking firms take that extra step to look at how they use technology – not just be content that they have it.

Think about it this way: you may have a very big and powerful rocket that can fly to Mars and back on a single tank of fuel, but what value does it have if no one knows how to fly it?

Improving how people work every day with technology is good for a firm's bottom line since it creates efficiency, which frees up more hours for billable work. Better processes can also increase productivity; save on staff time and associated costs; increase usability and

boost morale, and empower staff with the right training and tools.

NOT JUST ABOUT SHINY TOYS

Recognise that documents are the foundation of your billable work and that improving document workflows is crucial.

For firms, big and shiny projects like AI and blockchain can divert attention from the cogs in the machine that keep the firm working. While AI is exciting and all over your news feed, if your documents aren't searchable then the AI results won't be accurate, so what's the point?

Instead, innovate where it matters – documents. They are at the centre of every case and a crucial source of knowledge for lawyers and partners. However, without the right technology, they can chew up billable hours with slow, tedious administrative work.

Innovating the most basic workflows – like comparing two versions of a contract – can allow a firm to deliver the business of law better, faster, and more affordably than anyone else while minimising risks to itself and its client.

How? By identifying small changes that can result in big wins.

There are many document review and governance workflows that have the potential



to be done smarter and more efficiently, and technology has the tools to make this a reality.

Here are some examples:

- Cloud applications support mobility so lawyers can work outside the office as efficiently as they do at their desks.
- Integration between a firm's applications and its document or case management system can increase efficiency, since moving documents in and out of the repository requires more steps.
- Performance and stability issues – or just bad UX – can slow users down. Switching to more powerful tools can do wonders for productivity.

It's not just efficiency that these changes promote. Could innovating workflows help you to manage risk better? Consider whether the firm's metadata cleaner processes attachments sent from an employee's personal iPhone.

If not – there's a big hole in your data protection strategy. Run tests to check whether your metadata cleaner is catching and scrubbing high-risk metadata like embedded objects and hidden text (spoiler: often they're not).

TRACK IT

Lawyers have long been using document comparison software to find any changes made to contracts, case files, or discovery documents. Improving these document-review workflows can

help to find every change between versions in less time and with less effort.

For example, switching from one application that uses proprietary software to another that works in Word, pdf, or Excel without conversion can eliminate inaccuracies, save time fixing broken formatting and restore user trust. The way users work with the comparison report can also benefit from other, smaller changes.

For example, working with Track Changes comparison reports instead of redline makes document review 25% faster.

Users review changes in a Track Changes document faster because comparison reports marked up with Track Changes become the next working version of a document – users can accept and reject changes as they go.

It makes sense when you consider the alternative – manually applying changes from the redline report to the original document. Making one small change (outputting a report with Track Changes instead of redline mark-up) can make a big difference.

Sending a comparison report with Track Changes to clients or co-counsel may not be right for you but consider whether doing so could save time collaborating on documents internally.

It may make your work life easier – and that's a big win for innovation in anyone's books. [LPM](#)

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