SUPPLEMENT JULY/AUGUST 2018

# LPM
**LEGAL PRACTICE MANAGEMENT**

# *Major modernisation*

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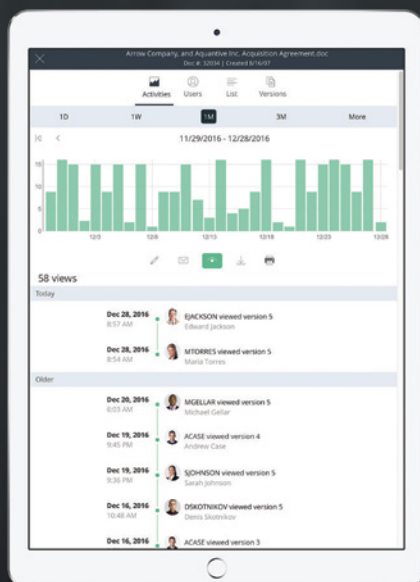
# MAJOR MODERNISATION

The drive to work smarter, provide flexibility to staff and improve delivery of services to clients is just the norm now – but doing it is no small feat.

Firms really have to prepare themselves in a way that will be well received by all who come in contact with them. This means preparing working policies that lay the ground as to what is and isn't acceptable for agile working. It means making sure you have the technology and security capability available to enable staff to work in such a way that they are well trained and themselves prepared to face the threats that are out there. And it means being flexible enough to react to the need of their clients, whatever the demand may be.

The term 'smarter working' has been used across media in recent years to encompass all of this. Hopefully, we'll see the 'smarter working' initiatives, which have come about in the legal industry, continue to evolve as the market changes – and not regress back into meaning just 'work'.

Kayli Olson, acting editor
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## About us

LPM magazine is published by Burlington Media. Burlington is a company 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.

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.

We also run the popular Legal Practice Management conferences, tailored specifically for anyone working in management in SME law firms and ABSs.

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

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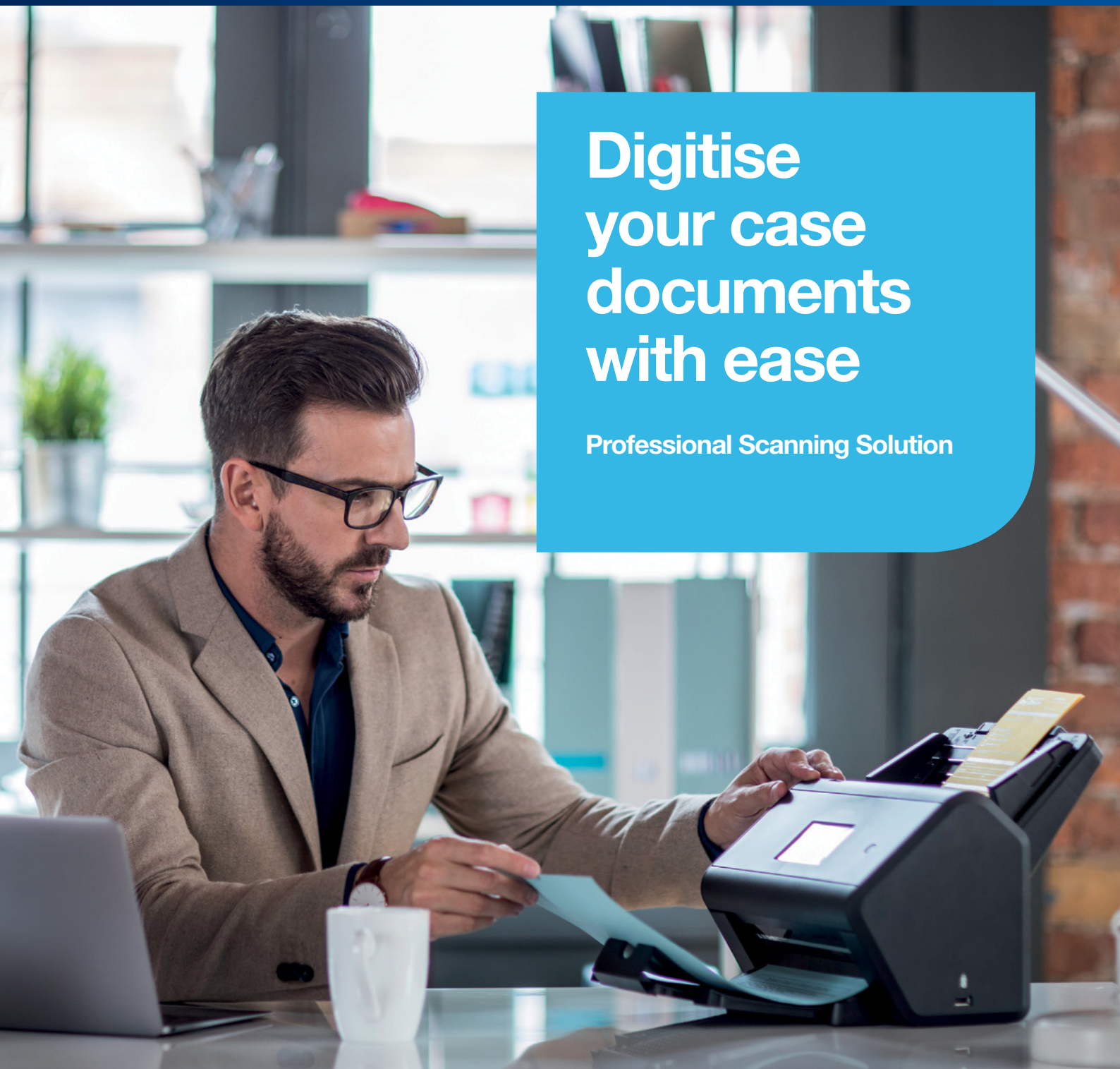
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# WORKING PROGRESS

It's time to modernise the way law is practised and delivered. How smart are law firms working? Kayli Olson reports

Firms need to be flexible and work smarter. No one wins anything by sitting in a cubical, staring blankly at their computer screen, with a stack of documents falling off the side of their desk, while the AC blasts too harshly overhead and the copier is jammed for the third time that day. This is 2018, it's time to stop working like we're in the 90s.

Luckily, there have been some fundamental shifts in the ways law firms operate – the traditional image of a law firm is slowly, but surely, changing as technology and new players disrupt the market.

Martin Lake, head of IT at Lester Aldridge, says: "Offering agile working is very beneficial for recruitment and retention of staff. Many of the trainee solicitors and graduates joining us are actively looking for better work–life balance and want to know what policies we have in place."

Lake says his firm has some fairly

> *"The cloud and use of outsourced services is key to ensuring the internal IT team is out there providing a value–add service to our end users in the business rather, than constantly performing maintenance"*

Nigel Stott, head of IT, Hudgell

traditional technology in terms of VPNs and security but is looking to roll out a desktop virtualisation project this year.

"The idea behind that is to provide a better scope for remote working, not just from home but ideally from anywhere, and still have a secure environment."

Ian Burrell, IT director at Ellisons Solicitors, says his firm recently partnered with Vohkus, an IT solutions and cloud provider, and is currently working on a digital transformation project. "The goal in mind is to really modernise our IT and the solutions we offer our staff and clients."

Part of Ellisons' digital transformation includes migrating its users to the Office 365 platform, which will provide further options and flexibility in terms of connecting its user base with clients and each other via the web. Burrell also says that the firm is moving its critical servers up into Microsoft Azure, which will feed back heavily into its disaster recovery planning.

Nigel Stott, head of IT at Hudgell Solicitors, says a key benefit of agility and smarter working is to create a consistency of experience. Hudgells is upgrading its infrastructure so that no matter which server people login to, the experience is always the same.

Agility also means agility of systems not just people, he says, as periods where systems are shutdown for an evening are no longer acceptable for the business.

"The ability to login to systems early in the morning and not be restricted by maintenance and back up windows is a huge step forward."

## DIGITAL DAYS

What does it all look like? Smarter working initiatives have been taking off in different ways across different industries. What may work for one firm or sector may not work for another. What is certain, however, is that everyone is going digital.

Lake says Lester Aldridge is in the process of selecting a new practice management system, which is a key application for its users, and one of the primary requirements for that is flexibility.

"We're using it to kickstart our business transformation initiative. It's fairly broad and all-encompassing but some of the key objectives are to improve some of our processes, easier remote working, and to become paper-light."

Burrell at Ellisons also says the firm has aspirations on its digital project timeline to become paper-light. "We'll do that through the implementation of document management systems made available on all devices, which will help drive a change in business behaviour. Getting everyone to understand that we don't have to print everything, and we don't need records packed in filing cabinets and so on."

Narrelle Roy, practice manager at Kerman and Co, says the firm did a systems upgrade in 2017, which provided an added benefit of filing directly from email.

"This has been a big time-saver for us and has also improved accuracy of our files. We are really cracking down on paper, apart from the documents we store on behalf of clients. At the end of a job, physical files are confidentially destroyed – with electronic copies retained – so we aren't hanging on to paperwork unnecessarily."

Earlier this year, she says, the firm took an afternoon to step back and review systems and facilities, what they need and why.

Similarly, Hudgell Solicitors scans all documentation that comes into the business and it is electronically filed for later review.

Stott says: "The only times we tend to use paper is where we're compelled to do so by the third parties we're engaging with – usually when dealing with courts, for example. But wherever possible, we try to make sure everything is stored and used digitally."

## EBB AND FLOW

Cloud is almost impossible to avoid when investigating agile and new ways of working. And there has certainly been a big push from the likes of Amazon and Microsoft to get businesses in the cloud.

Lake at Lester Aldridge says the firm has a few applications in the cloud but is currently reviewing usage. "Part of the decision process we're going through in our business transformation project is asking how ready Lester Aldridge is for full–on cloud-first strategy."

On the other hand, Stott at Hudgell is a big believer in the cloud. "For me, the cloud and use of outsourced services is key to ensuring the internal IT team is out there providing a value–

add service to our end users in the business, rather than constantly performing maintenance."

Burrell, too, says Ellisons' overriding strategy is cloud-first. "Where we can migrate or commission a new service in the cloud, that's our first option. We'll be moving our CMS, Partner for Windows, Bighand, and then some supporting systems into the cloud."

And the firm has been hotdesking for a while. Burrell says: "We're trying to squeeze as many staff as possible into our offices at the moment, which may sound like a big challenge but ultimately it comes back to agile working and the opportunities that come out of that. Our people are able to work from home or come into the office on an adhoc basis."

As a further addition to Ellisons' agile arrangements, the firm is in the early stages of moving its telephone system to a cloud-based PBX. "It's about empowering staff to work in the way that suits their needs," Burrell says.

Likewise, Stott says his firm is starting to look at telecoms again – giving people the ability to tap into their desk extensions from their mobile phone is a great tool. Though, he adds, there hasn't been a massive requirement to adopt a formal hotdesking policy in particular at Hudgell Solicitors.

For Kerman and Co, Roy says, staff are very well supported from a technology standpoint – its CMS and PMS systems are in the cloud and all phones allow for hotdesking. "We have pairing facilities, so if you're not at your desk, calls will be directed to your mobile or home as needed."

## ONGOING TRAINING

Agile working and use of mobility enabling technology is all well and good, but IT has the never–ending task of making sure that not only are systems secure and, most of all, that people are aware of threats and risks that come with their new-found freedom.

These days, Stott at Hudgell says, security is taken as a given and a big issue is that threats keep evolving and will continue to become smarter and more advanced – so business leaders need to train up people more regularly in order to stay resilient.

New starters at Lester Aldridge are mandated to pass an online GDPR test in the first week of joining. Lake says: "We understand that the systems we put in place must be GDPR-compliant by design. Our virtual desktop project will put security at the heart of everything we do and secure behaviour is embedded into that training."

He, too, sees the pace at which security changes and so Lester Aldridge has a continual staff–training programme, backed up by improvements in infrastructure. For example, he says, the firm has expanded GDPR compliances with an ISO27001 project.

Burrell agrees: "There needs to be as much focus on user education and training around
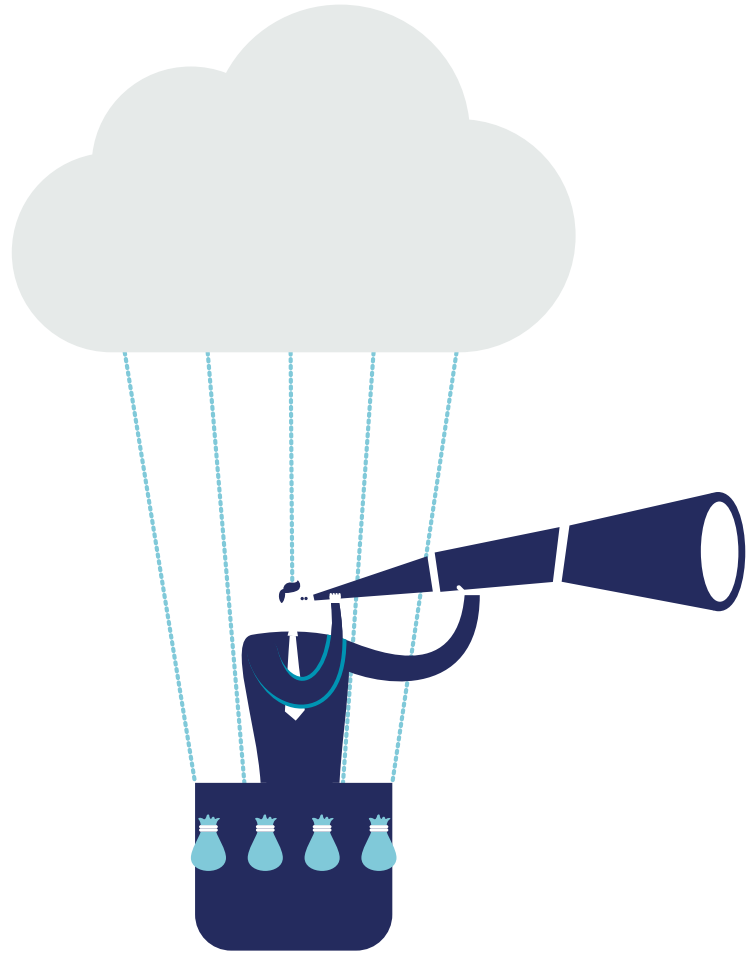
> " *People need flexibility. As a business you need to have the processes and technology in place to make sure they can work securely and effectively.* "

Martin Lake, head of IT, Lester Aldridge

security as there is for the security of the systems."

"We are seeing an increasing number of attempts made at committing cyber crime directed solely at our staff. In some scenarios these attempts can inflict sizable damage on the firm, its systems and reputation. Education and strong infrastructure defences together help to provide the security needed to keep businesses out of trouble."

## CHANGING TIME AGAIN

Change is unforgiving – firms can either take action about the ways they work and modernise their use of IT or get swallowed up by those that do. Just because something worked in the past doesn't mean it'll continue to work in the future.

It's not always easy for SME firms to get their people to adopt new, smarter ways of working. Roy at Kerman and Co says people get used to doing things the way they do and there will always be an initial challenge that comes with a change in a system or to a routine or process.

"We rolled out our new IT system in a very orderly way – everything was explained, everyone trained and people could see how the benefits fed back into their work."

And, she says, the key to success is good communication. What does communication look like? Does it have too much "IT-speak or do you need a man-in-the-street version?" Leaders have to demonstrate why the change is taking place and why staff should care.

Burrell at Ellisons agrees that people need to see how the business is going to benefit.

"There's always a risk that our user base have the perception that when the IT team does something, we just do it and they can't see the real benefit. I think it's important that before we set

out on any project, we explain what it is we're trying to achieve, how it'll be measured and how it'll help our culture and business grow."

Lake at Lester Aldridge agrees: "This isn't just a handful of people in IT or one or two senior people delivering this to you. Engagement is absolutely critical.

"We will have a steering group, which consists of various people from different areas. Below that there will be targeted project user groups, which will include a wide spectrum of people from partners to PAs, finance, HR and so on. Change isn't something for the higher ups, it's a business-wide journey."

Roy at Kerman and Co says this applies more directly to agile working. No matter the definition or how 'smarter working' manifests itself in a firm, she says, it should encompass all staff.

"There shouldn't be a divide between fee earners and support staff. Agile should be a philosophy that extends across the whole firm," she says.

Agile is for everyone – this includes clients in the mix. Roy says: "Whether it's [to meet] demands from clients or to make improvements internally, smarter working works out to benefit everyone. We're applying automation to a lot of standard documents. That will speed up processes for our clients and our lawyers will have more time to do the work that will add value to them."

Lake says any business transformation initiative is about people first. "People need flexibility. As a business you need to have the processes and technology in place to make sure they can work securely and effectively."

And for the modern SME law firm, flexibility and digital working will mean the world to its staff and its clients. It's time for the SME legal market to enter the 21st century. **LPM**

# HIVE MIND

Adrian Jones, product development director at Tikit, dives into the busy life of the SME law firm and points to where it can leverage technology to work smarter

The last few years have seen a tremendous amount of change in the way people live, work and interact with one another. The biggest driver for this is, of course, technology.

"We live in a digital world. Everything we do as consumers is online and easily available," says Adrian Jones, product development director at Tikit.

"And the SME legal market has a lot to gain if firms can leverage these technologies available to them. Luckily, there are a number of great solutions out there and more are easily accessible for SMEs than they might think."

Smarter working is good for business but it also needs to work for the client, in terms of the service and experience they get, he adds.

## SWEET FUTURE

Firms should take a look at why they want to go agile and where they should, Jones says – agility made for lawyers ultimately has to translate to positively affect the experience of their clients. Everyone expects communication to happen in a much more electronic, joined-up and seamless way.

"Take a look at the number of things you do online – you buy car insurance, apply for a mortgage, order next-day delivery on groceries – it's completely different compared with how it

> *Take a look at the number of things you do online – you buy car insurance, apply for a mortgage, order next-day delivery on groceries – it's completely different compared with how it was done previously, even just five years ago. Law firms need to evolve in the same way.*

was done previously, even just five years ago. Law firms need to evolve in the same way."

This evolution can be done in multiple ways – it doesn't mean a major overhaul of a firm's business model or legal services – a simple change in the way work is processed or how people collaborate can make all the difference.

Jones says Tikit's Partners for Windows (P4W) is the flagship system for SMEs looking to change the way they work for the better. It's always improving and evolving as trends in the market emerge, he adds.

"The more forward-thinking law firms absolutely recognise that standing still is not an option and they have to evolve the way they work and think differently. P4W is constantly evolving and won't stand still."

These evolutions are not often ground-breaking innovations, he says – smarter working isn't always about market-led change. The most that is to be reaped from changes to the way law firms work are incremental, but crucial, points along a firm's journey to modernisation.

Take signatures as an example, Jones says. "Historically, if you wanted a contract signed, it would be printed, posted, signed and then posted back. Digital signatures are now accepted in the profession. Now, with P4W integration with Adobe Sign, you can generate a contract, upload it for electronic signature and have that signed copy back in the case management system within minutes of speaking to a client."

And it's traceable, which is great for auditability. "You can see when that agreement was opened, reviewed, signed and so on. We see this as a key change of direction to a paperless and smarter way of working. That's why we've become an Adobe Sign OEM Partner."

Tikit is facilitating innovation. Its user group and forum provides firms with the ability to connect with other firms like theirs and compare notes, and gives Tikit insight into the market and its needs – which means it can work together with firms to create process improvements and more agility.

"It's important that we are quick to react to the needs of the market, but we're not going to sit back and wait for them to tell us what they want. We need to be proactive and reach out to our

clients to test our theories. That's where innovation and evolution thrive – trial and error."

## GOT YOUR BACK
There's an increase in smarter working initiatives that have come out of GDPR, Jones says. Firms are still working on GDPR but it's not a focus any more. "Firms should already have plans and implementation well underway – so, now that their decks are cleared of that, by and large, it's time to start thinking of other things."

What GDPR has done, he says, is made law firms think about security and processes – how they should communicate and look after data. It's been a great catalyst for change rather than an end-point in itself.

Jones says law firms looking to improve their 'smarter working' can also leverage NetDocuments in P4W. "It gives them the security and peace of mind so that if a system goes down, they can still work on documents and meet client demands. But the key thing is it enables agility.

"Staff can start a document in the office and then, if they want or need to, they can go home and finish that document – NetDocuments syncs back in to P4W and saves them time in the office and, more importantly, on keying in the same data."

It's also more secure than copying it to a memory stick or insecure systems such as a personal email or Dropbox, he adds. Everything is joined-up and synchronised in the P4W ecosystem – it was made with agile working in mind.

There's been a big push in the legal sector for more efficiency. "I see a lot of time could be saved in the time recording and billing processes. It's a very tedious and often inefficient process. If you look at other industries, bill production is an automated and seamless back office process."

The profession needs to evolve fast to keep up with client expectations – Jones says the world will only continue to become more digital, and that impacts the way clients want to interact with firms, and what they demand. The pace of change is not going to slow – so law firms need to have agile systems. **LPM**

# LIBERATING LAW

Aaron Hopkinson, product and solutions manager (scan and mobile) at Brother UK, discusses how technology is liberating the legal sector

Around the world working practices are changing, and the legal sector is no exception.

It's been forecast that by 2020 as many as half of UK employees could be working remotely, and while legal firms might initially have been slower on the uptake than other sectors, momentum in the industry has gradually built.

Firms like FlexLaw and Excello Law have introduced to the sector disruptive new agile models, designed to capitalise on the practical and financial benefits that remote working brings – and there are many.

Real estate costs, including business rates, have continued to grow and, in response, a new breed of flexible office spaces has emerged, offering all the resources of a more traditional office, but without the commitment of having to sign a long lease.

Crucially, workers also seem to thrive away from the office.

## HOME AND AWAY

Research has found that staff working remotely are 16% more productive, they enjoy better morale, stay with the business for longer and are easier to recruit. This is a trend especially prevalent among younger people.

Seven in 10 millennials (born between 1981 and 1996) say they would favour a job that offered them flexible working. Since 2014, employees have the legal right to request flexible working, including working from home, and employers must deal with their requests in a 'reasonable manner'.

What's important is that employers equip their staff with the technology needed to work as efficiently as possible, whether that's at home, on the road or anywhere else.

This can be a particular help for firms in sectors that have traditionally had lawyers travel to meet their clients, such as shipping law and intellectual property, because travel time is no longer being wasted.

## THE LETTER OF THE LAW

The legal sector has always had a heavy reliance on paper-based processes, and efficiently handling large volumes of mail and paperwork is part and parcel of running a law firm.

Digitising documents is crucial to enabling agile working, as it gives those working offsite the same access as their colleagues in the main office.

Law firms should be looking to digitise as many paper documents as they can, especially those that arrive in the post, in order to minimise the time spent organising mail and maximise the benefits of working with digitised files.

But it's important to make the potentially onerous process of digitising documents as efficient as possible, and law firms are using technology such as Brother scanners to accurately and quickly digitise thousands of case documents every day.

Working together with conveyancing specialist BPE Law, Brother's scanning solution was able to cut scanning time by more than 60% from two hours a day to an average of just 45 minutes, saving more than six hours of administration time every week.

## OPTIMISING EFFICIENCY

We've also developed our Post Partner software specifically with paperwork-heavy industries in mind.

The software uses state-of-the-art technology to move digital scans of post and other hard copy documents directly to the optimum location in a business's system as efficiently as possible and with minimal human involvement.

By automatically placing the scanned document into the correct client case folder, it effectively streamlines the process while removing any room for human error. Post Partner is designed to integrate seamlessly and can be implemented with minimal disruption.

Firms tell us the system not only saves fee earner and admin time, it also saves on archiving

costs, helps support GDPR compliance, reduces data-loss breaches and, crucially, enables efficient and secure remote working.

With lawyers regularly attending offsite meetings and court, this immediate access to digitised documents, including vital correspondence, can give them a competitive advantage over their rivals.

Storing files digitally can make them more secure, organised and easier to search, supporting compliance and regulation and slashing the time spent finding and processing information.

Given the scale of the information stored by even the most modest legal practice, and the fact that smaller practices are unlikely to have the kind of in-house tech expertise required, teaming up with an experienced technology solutions provider makes perfect sense.

It can bring a wealth of new skills and technologies, as well as efficiencies and cost savings to practices. This represents a fundamental shift away from the traditional model of investing up front in new tech in the hope it pays for itself in the long run.

## PROACTIVE PRACTICES

Instead, with a managed print service (MPS), IT is delivered as a service, with regular upgrades to scanners and printers, training and maintenance all included.

Old or poorly configured hardware will be replaced with modern models, installed by an expert and connected to a monitoring system that automatically orders replacement toners and paper, and alerts an engineer if a repair is needed.

It frees up staff time to focus on what they do best – providing a first-class service to the firm's clients without the distractions of day-to-day maintenance tasks.

We've created a simple online calculator to help estimate the time and cost savings that MPS could achieve in a practice.

So, while a firm may not be ready to go virtual yet, we can see how the right technology can enable legal professionals to work in a far more versatile way.

Proactive practices of all sizes are already seeking to futureproof their processes. Don't get left behind. LPM

# TECH SMARTS

Paul Walker, technology director, EMEA at iManage, tells LPM why law firm clients of all sizes and specialism are taking inspiration from the consumer world and demanding smarter working

t's no surprise that the way clients consume goods and services has changed drastically in the last few years, and will continue to do so. More social and cultural ideas are meeting up with technology, which is changing the way firms adapt to the marketplace – how they deliver services back to their clients and, fundamentally, how they look at their own talent-base.

And Paul Walker, technology director, EMEA at iManage, says he's seeing some significant changes, not just in the SME market but in the legal sector and wider professional services market as a whole.

"Of these big technological changes, the advent and acceptance of cloud has been at the forefront. It's not just a platform anymore, it's a means of delivery – and it enables SME firms to get a hold of new technologies and services earlier in their evolutionary cycle."

With the technology and cloud capability available today, Walker says anyone could spin up a firm, hire 40 lawyers and within a matter of weeks have a set of technologies that the big firms have taken 10–20 years to build. There's no longer a need to go out and acquire all of these solutions and stitch them together.

"That's really what is to be leveraged from cloud technology – getting hold of services and functionality faster and more efficiently. And for a firm looking to become more agile and work smarter, being able to use technology at the drop of a hat has huge advantages," he says.

## PRACTICAL AI
Businesses that offer flexible and mobile working are attracting and retaining talent because it gives them the lifestyle benefits that many now come to expect. And mobility is a central capability of the cloud, Walker says – there's no need to go to the same office and sit at the same desk every day.

"With the right technology in place, virtual users are able to perform the services that their firm requires anytime from anywhere. Smarter working isn't just a benefit to a firm's processes, it benefits the client and the law firm staff."

There are multiple cost pressures on just about every type of firm, and SME firms are often expected to be more cost-efficient than top-tier firms, Walker says.

"We've seen the way our law firm clients have been able to deliver services in smarter ways and

## WHY AGILITY MATTERS

**1** **AGILITY FOR THE CLIENT** How are services delivered to your clients? Your customers' requirements could change on a daily basis, their business will shift, their matter types and areas they need assistance on will change. If you're a trusted adviser, then they want to see that you are going to change as their business does. The same is to be said for private clients – if not more so, as these individuals are more likely to seek out firms that are as easy to work with as ordering shopping online.

**2** **AGILITY FOR THE END-USER** Employees are demanding more flexible working environments. They're less tied to an office and want a business to be able to provide them with the means to be flexible and work wherever, in a secure and easy manner.

**3** **AGILITY FOR THE TECHNOLOGY TEAM** Technology can enable small and stretched IT teams to be more responsive and proactive in the service they deliver to the business. Using cloud technologies not only gives them access to awesome technology but also means they can be agile and better meet the changing needs of the business.

apply technology to problems rather than having multiple humans processing the data. Why put 50 paralegals in a room reading through thousands of leases on behalf of a client when you can get a machine to process some of that information, extract data points, prioritise and sift through it and then assign tasks to a smaller number of users to review high priority content?"

Walker adds that this drive to deliver greater value to clients is requiring IT directors and COOs to focus less on the basic requirements and more on operational and process efficiencies.

And there's a lot to be leveraged from automation and artificial intelligence. "If you look at how AI is delivered in consumer tech today, you don't really know it's there and you don't go and ask for it. The vision we are aiming for is quicker cycles, for example to speed up the drafting of documents and also the pace of responses."

### NEED TO KNOW SECURITY

Walker says the idea of opening up access to make it more secure is counter-intuitive in most people's minds. "The irony is that it's actually more secure."

He says that when technology departments lock down access to the firm's systems while outside the office or from mobile devices, there are more leakages of data into non-vetted repositories – things like staff's personal email accounts, Dropbox and so on. People will find a way – and more likely than not, they do.

The perception that security means removing access when out of office needs to stop, he says – and there have been a number of evolutionary steps in cloud technologies that have enabled more security.

For example, customer-managed encryption keys is a particular kind of reassurance for firms to protect client data even though it's sitting in a third-party cloud data centre. The cloud vendor can't read that data, and they can't hand it off to a regulator. The only person who can read that data is the person with the key.

"Particularly in the UK SME market, some clients are very hesitant to go to cloud. A remedy for this is a data escrow service, which is a full replica of data being stored in the cloud, going out to another provider for storage – it could be with Microsoft or Amazon.

"It means that if there was an 'end of days' event for the cloud vendor, the firm still has access to their data. It gives law firms back the control over their data, should they need it."

In the last 12 to 18 months, Walker has seen a shift in the entire legal industry's mentality from a previously open security model to a 'need to know' security model.

"This has been mainly driven by client demands – due to a growing perception in the outside world about what firms are doing with data, and also with regulatory pressures such as GDPR and news around the big consumer data scandals."

It's about having a circle of trust, he says – only those who need access to certain documents or areas of interest are given it and nothing more.

"It's quite easy to set up a phishing attack and procure someone's credentials. And hackers are clever. They don't do what's called a smash-and-grab, where they go in, steal data and get out.

"Instead, they do what I call a low-touch operation – they come in and live in your network with you quietly. They occasionally touch different nodes on the network looking for pieces of information."

Walker says iManage can track how users interact with certain files and pick up on unusual activity. And the software constantly learns from changes in staff working patterns and adapts accordingly.

As demands increase for smarter working from staff and clients alike, security and best practice will continue to be challenged – now more than ever SME firms need to learn to become more operationally nimble and responsive to client demands. And adopting a platform that brings together these core capabilities will provide significant competitive advantage – and it is no longer out of reach. **LPM**

# Tikit P4W

## Efficient
## Compliant
## Competitive
## Profitable

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