SUPPLEMENT INSIDE: UNITE TO THRIVE **JUNE 2018** THE ONLY MAGAZINE FOR LAW FIRM MANAGERS LEGAL PRACTICE MANAGEMENT **EXPERT COLUMNISTS AND ADVICE FROM PRACTICE** MANAGEMENT LAW FIRM PROFILE Gary Gallen, founder and CEO at rradar, talks moving from conservatory to AI LPM ASKS Alan Barrett, head of IT at TWM Solicitors, on app-ifying systems, and other change How are SME law firms using modern services to make themselves stand out against competition?

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WELCOME

Cheeky banter in the pub with your mates over how 'that referee clearly didn't make the right call' isn't all that different from the law firm who moved in next door. like a good bit of competition to fuel creativity and relieve stress. Yes, relieve it. Competition can be a stressful aspect for any business, or person, but what matters is how you play on it. Competition is only natural – the world would be a much duller place without it. Cheeky banter in the pub with your mates over how 'that referee clearly didn't make the right call' isn't all that different from the law firm who moved in next door.

Do you know who your competition is? Where they are, what they do, how they do it better than you, faster than you, and what it takes to beat them to the top? If you think you have the answers, you might want to think again. Richard Parnham is back again on p29 to ruffle your feathers.

Need another lesson in the best ways to get clients to give you money? Glyn Morris's second column will explain what you need to know (p14).

How about some lessons from a firm in the north? The law firm profile this month (p20) takes a look at rradar, it's 'one to keep your eye on'. Hear about how it gives its clients stations and podcasts and videos. And that's not all, it has a fancy artificial intelligence called Grace – perhaps AI isn't just for the big firms after all.

Kayli Olson, acting editor @LPMmag | kaylio@lpmmag.co.uk



∠ ⊃ SUPPLEMENT INSIDE: UNITE TO THRIVE

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About us

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ISSN 2398-9742

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IN PRACTICE



SNAPSHOT SPARE CHANGE?

ransformation is all over the legal market this month - both in good and bad news. Maybe it's summertime motivation or heat stroke - whatever the reason, there is shake-up in the sector.

The exciting new Courts Bill was officially announced at the end of May 2018. The bill will see online dispute resolution become a central part of the justice system, and is an important first step for legislation to modernise the court system. It aims to "shift justice from slow, paper-based systems to streamlined, efficient digital services," the government said. It will also seek to use judges flexibly across jurisdictions – hopefully strengthening their experience in different types of cases.

A similar movement to create modern working - the Prisons and Courts bill was dropped in April 2017 in General Election runup due to its "washed-up and misguided" reform said Law Society president Robert Bourns at the time. But earlier May 2018, the National Audit Office and many others voiced concerns that the halt on the changes would hurt the government's plans to modernise courts by 2022. Unfortunately it has had little progress since. The bill listed plans for modern courts through the use of more video, telephone conferencing and online processes in an aim to remove as many civil and criminal cases from the traditional courtroom setting as possible.

In other 'voicing concerns' news, **the Criminal Bar Association's (CBA)** member survey found that 90% of criminal barristers were in favour of the protest against legal aid cuts.

CBA chair Angela Rafferty QC said that "the criminal justice system is collapsing," with thousands of criminal barristers refusing new work due to cuts to the Advocates' Graduate Fee Scheme since March 2018. And government ministers have offered the bar £15m to suspend the protest.

A survey by professional services firm



MHA found that fixed fees have been a factor in an income drop in 2017 felt by smaller firms. Finding the sweet spot between adjusting prices and staying profitable can be a tricky feat. Price competition in the market remains a strong factor in profitability. The report also found staff profiles in law firms shifted in 2017, with fewer senior fee earners, more paralegals and more support staff than previous years. The fall in fee earner numbers is also a factor in the drop of fee income, but MHS says profits are expected to increase in 2018 once change has stablised.

MHA also said that bank lending to the sector has reduced in the last couple of years and firms are turning to alternative finance streams to fund large one-off expenses, like PII. LPM

✓ Have you got a story or report for us? Write to lpm@lpmmag.co.uk "When I said I wanted access to justice, this isn't what I had in mind ..." Where's the money? A significant number of firms in the legal sector are in danger of breaching new anti-money laundering (AML) legislation.

N NUMB



of law firms still use paper-based filing for AML

24% of law firms don't

have a dedicated AML officer



Source: Credas





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GEORGINA HAMBLIN

DIRECTOR, VARDAGS The traditional partnership structure, which continues

to exist in many small to mediumsized law firms is, in my view, well past its sell-by date. It's only once you look as old as the furniture that you're permitted to become part of it. No particular spark of genius or achievement is going to change the speed of your progression. The whole attitude breeds complacency from top to bottom, and vice versa. Structure is important but it need not be restrictive. We champion, reward and promote brilliance from wherever it comes in the hierarchy. A true meritocracy is the way forward and gives nobody the excuse to rest on their laurels.

TIM SCOTT

DIRECTOR OF PEOPLE,

FLETCHERS SOLICITORS

A law firm's structure will

undoubtedly influence its culture. In my

liability partnership models still seem to

Fletchers, offers more cultural flexibility

experience, within any organisation, people look to the top for a sense of

how to do business. While the more

traditional partnership and limited

prevail, some argue that the limited

company structure, like we have at

through its broader governance. For

me, the critical thing in any company's culture is the approach and beliefs of

its leadership, regardless of structure.

JACKIE GILLESPIE

HOWLETT CLARKE

Google approaching work culture in a

buy-in, law firms need to do likewise,

as the next generation of lawyers look

for work with meaning and value. If a

firm retains formal partners at the top

and everyone else below, it creates a

'them and us' culture, not necessarily

compatible with the needs of lawyers

value in including people at all levels

some hierarchy, but there's more

today. Of course, there still needs to be

creative and imaginative way. To obtain

We see innovative companies like

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Creating a good work environment is no simple feat - we ask LPM readers:

"Do you think a law firm's structure affects its work culture?"



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GUY LONGHURST

MANAGING PARTNER, **ELLISONS SOLICITORS** A law firm's structure certainly can affect its culture, but doesn't have to. The culture of Ellisons, which has developed over 250 years, has been fundamental to our success, and is something we have been determined to preserve as the firm has grown rapidly. There is a risk that a more corporate structure will lead to commercial decisions that affect, or are perceived to impact negatively upon, the culture of a law firm. This can be avoided by strong leadership, ensuring the culture of a firm is understood and respected by the entire management team and all of their colleagues.



FLORENCE BROCKLESBY

PRINCIPAL, BELLEVUE LAW While culture isn't sacrosanct sometimes things need to change - at Bellevue we actively try and remove any barriers that prevent us being the friendly, helpful business we set out to be. In my experience as managing partner, you have to be mindful of how even small decisions which compromise your culture may play out. The best way is to turn down things that feel counter-cultural. That's easier said than done, especially when you're first starting out.



GEORGE BISNOUGHT

FOUNDER AND MANAGING **DIRECTOR, EXCELLO LAW** The structure of a business

undoubtedly has a significant impact on the nature of its working culture. Firms that have a flatter structure, and a business model with agile or flexible working as a core value, offer a truly refreshing alternative for lawyers who are passionate about their work but want to be in control of their daily working lives. Being given complete freedom about where and when you work creates a culture in which lawyers feel truly valued, less stressed and more productive. We don't measure billable hours - we're much more interested in the happiness of our lawyers at work and the quality of the service they provide to their clients.



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IN PRACTICE

ASK THE EXPERT



IT'S TIME

Alan Barrett, head of IT at TWM Solicitors, talks security scares, mobility projects and rolling out change in a law firm

What are your biggest IT challenges at the moment? Security is still a hot topic, and it keeps us ever-vigilant. My colleagues' awareness of the issues has grown exponentially over the last couple of years with our cyber-awareness training regime, although we still get the odd one asking if they can open and download Dropbox files on email while not being sure that they're expecting anything from the client. Like many firms, we're getting far more targeted attacks. which is a deeply worrying trend, especially when the criminals are now starting to target the client to get at us. The other obvious thing is exploring how we can drive efficiencies. Mobility is key here, and after some beta testing earlier this year, we've just gone live on a project with AppDome, which provides us with the ability to take an app and 'fuse' it to our

master data management software development kit, in this case Blackberry. We started with the BigHand app on Android and 'fused' it to run through our BES without opening lots of firewall ports - essentially piggybacking on the security layer that already exists. And we're in early stage discussions with Microsoft to do it with their remote desktop protocol app. Ultimately, I can see this working for so many of the apps that we use, but we must ensure that security and mobility aren't compromised.

QHow has the way you speak to partners and leadership changed over the years?

A The relationship with partners here has always been good, but it's inevitable there is a communications gap between IT and legal professionals. Security is a

particularly difficult topic to discuss, as it's hard to assess how secure you actually are. Our managing partner has a "points on a curve" framework and we use this as a way of deciding how much security and spend is appropriate. Of course, this hasn't always been the way and there was a turning point a few years ago when we had a ransomware attack, which we quickly resolved. But I think that this incident changed attitudes and an outcome was we set up our cybersecurity team. This was a big paradigm shift for us from a viewpoint of relying on our defences to be 100% successful, to taking a more holistic approach across the business. and this is reflected more widely in our business continuity plans.

How do you promote IT change in the business?

As an SME firm, we have a limited IT team, and as a consequence you have to be multi-skilled. You've got to have the vision - and the skills to convince, research and deliver it. I usually take a lot of change management strategy and psychology into consideration when attempting to put in place something which potentially changes the way people work or deliver their service. One of the problems I've had throughout my career is that many projects are seen as purely IT or purely business. But now in this digital age, everything is so connected to some form of computing that we have to make equal effort with both the technological implementation and the management of the user's experience and learning whenever we attempt to deliver a project.



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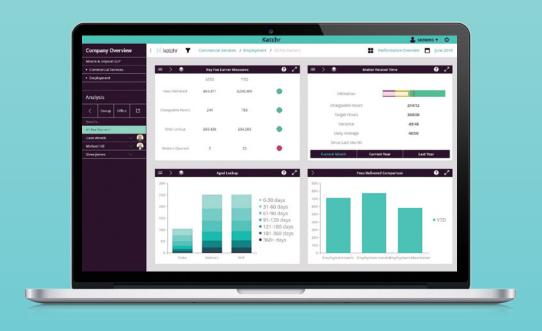


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OOD FOR THOUGHT



Polly Jeanneret, LPM's HR guru, on benefits and challenges of healthy working, living and eating ...

Should we find space (and budget) for a work canteen?

I find lunch really tricky: I can't relax enough during my working day to stop for it but I do actually need to refuel - both in terms of food and just taking a break. So a work canteen, for me, would be a perfect way to stop and not stop at the same time. A canteen enables people who don't want to take a lunch break to take a lunch break. There is scientific proof (ok, not scientific per se, but lots of HR people commenting online) that canteens go "above and beyond providing a food service," they are

"social hubs" that can "instill a sense of belonging and engagement." But beware a few pitfalls, like: keeping the healthy versus unhealthy balance; staff will discuss (moan about) this relentlessly. Then there's the queueing/ logiam problem where you discover that staff are not feeling that belonging vibe but more a fed-upwhingey vibe. Note this from Google: it found that its staff didn't mind spending three to four minutes in the lunch queue because it gave them time to socialise. But beyond that, queueing made them feel they were "wasting time"

One of our departments is Q One of our department almost entirely staffed by people on flexible working. The head of department is quite relaxed but other partners complain that they can "never get hold of anyone" in his practice area. Can we put limits on flexible working?

Partners always say that A Partners arways say they can "never get hold of anyone." Like they always say "it's billing time." But they do have a point. Too much disorganised flexible working can negatively impact on a department because, for some weird limits-of-human-nature reason, no one can ever remember who is in on which day. And if you're not superorganised yourself, if you don't time your workflows properly and miss someone's working day, you might be waiting an age to get a simple task done. The problem is that staff absolutely love flexible working.

If you read my most recent analysis on attracting and retaining talent in law firms, flexible working is, in the words of one law firm, "part of the modern employment model." And just to pick one recent statistic: in Douglas Scott's most recent salary and benefits benchmarking survey, flexi-time - the simple ability to start and finish at different times - came up again as the most valued benefit, ahead of bonuses. ahead of extra holiday. The answer, therefore, must lie in having organised flexible working. But who's organised enough to have the time to arrange that? LPM

Polly Jeanneret is an expert in HR and an employment lawyer at Halebury to boot - she's seen and heard it all. Send her your HR questions: ASKPOLLY@LPMMAG.CO.UK

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JUNE 2018



SQE silverlining

Tricia Chatterton, BPP's training guru, breaks down the chit-chat around the new Solicitors Qualifying Examination

Q l've not read much that praises the new Solicitors Qualifying Examination (SQE) – is there anything that my firm can feel positive about when it finally gets implemented?

A You're right that a lot of commentary around the SQE has been negative, but its introduction might offer a silver lining. The current LPC doesn't truly provide for the development of the full skillset that our trainees need now, let alone in the future. The wave of changes being introduced could actually ensure that the next generation of solicitors get the right training they need to cope with the modern demands that are going to be put on them.

QI don't understand. I thought the consensus on the SQE proposals was one of

disappointment and frustration? Critics have complained that Athe SQE syllabus is very narrow and is focused on the 'reserved areas of practice' without providing for any training in practice areas like family law and employment, but a key part of the SQE proposals is that they will bring about the end of the current prescribed courses such as the GDL, the QLTS, the PSC and the LPC. That actually creates an exciting opportunity for the profession and innovative training providers to design programmes that genuinely prepare new solicitors for both current and future legal practice.

So, this is actually a good opportunity? This isn't just a good

opportunity, it's a massive opportunity. Free from the regulatory shackles prescribing the curriculum content it will now be possible to redefine the knowledge and skills that are needed for modern legal professionals. New entrants will still need grounding in basic research, writing and drafting, but we'll be able to teach and assess these skills in a way that better reflects how work is carried out by a 21st-century lawyer. Law was once about selling legal expertise, but nowadays - even for the smaller practice - it's increasingly about providing firstclass client service supported by legal, digital and even technological knowhow. New training programmes and awards that embrace digital and traditional skills will equip law students to tackle realistic client problems, mirroring the way that they will work in the office and start their journey to being resilient and reflective practitioners. We need to be certain that the lawyers of tomorrow feel comfortable about the way that technology is disrupting the profession. For example, in the future these trainees will not only need to be able to process-map a transaction, but to work with IT experts to deliver legal services more quickly and effectively. We are already designing our new programmes right now. In fact the new apprenticeship route to



qualification already offered by BPP ticks a lot of those boxes by combining work-based learning, a reflective portfolio and practitionerfocused legal studies. Once the SQE comes in, that route will be open to law and GDL graduates as well, and for smaller employers, the opportunity to source funding from the government's apprenticeship levy makes this a very attractive option for future talent. BPP and the many firms we work with up and down the country, are all much more interested in defining the professional training needs of the future than simply meeting the SQE regulatory minimum.

Tricia Chatterton is director of legal apprenticeship programmes at BPP University Law School.

Send her your questions: TRICIACHATTERTON@BPP.COM

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A BATTLE OF PAYMENTS

GLYN MORRIS, PARTNER (NON-LAWYER) – HEAD OF FINANCE



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Revenue: £17.08m

Corporate status: ABS partnership 119 fee earners,

205 total staff Office: West Midlands n my previous article, I highlighted the different methods of making payments or receiving funds that are encountered by law firms. But often the most common ways that a client might send transactional funds to be received by a firm is by either Chaps (Clearing House Automated Payment) or more recently Faster Payments.

Chaps is used for making high-value transactions (typically over £250,000) where same-day guaranteed payment is required, as in buying property. Since June 2017, Chaps payments have been operable for an extra hour and 40 minutes, closing at 6pm for bank-to-bank payments, instead of 4.20pm. Though this may be exciting news for some, you should be aware that the deadline imposed by each bank may differ.

Clients and firms alike should also remember that Chaps is not available at all banks, and some receiving bank or building society accounts may not be capable of accepting Chaps payments that are sent. Additionally, delays to Chaps payments may occur for several reasons, including checks for compliance with international regulations by the potentially multiple direct and indirect participants involved in the payment chain.

Client top tip – law firm clients may want to discuss with their bank what time the recipient firm might expect to receive a Chaps payment, especially for time-sensitive transactions.

Faster Payments are normally for making payments below the limit of £250,000 and which need to be paid on the same day or may be future dated. Payments are 'normally instant'/'normally clear' in less than two hours, provided both the sending and receiving banks are part of the Faster Payments Service. Members of the Faster Payments Scheme can be found online.

But timing differences may occur because the system routes payments in different ways depending on payment type, time authorised, debit and credit day, or insufficient funds. Delays could also be due to the account being an ISA (generally credited the next day), an account with other restrictions, or a type of account that requires meaningful reference information which has not been quoted.

In addition to the above, you might just want to read up on the Credit Payment Recovery guidelines to understand what happens when a payment is made in error!

The central Faster Payments infrastructure provides a response to the sending bank within 15 seconds, confirming that the receiving bank has accepted or rejected the payment. Reasons for rejection may include incorrect bank details, operational issues at the receiving bank, or that the receiving account does not permit immediate posting of the payment either at all or just at that time.

Payments under £250,000 keyed as 'Standard Domestic' payments may end up being routed through the Faster Payments system, providing the beneficiary sort code is able to accept faster payments. If either bank is not part of the Faster Payments Service, the payment will automatically be processed through Bacs direct credit instead (and will, therefore, be subject to a longer processing timeline).

Faster Payments are normally cleared on receipt. But during the day of receipt a firm may be unable to confirm which payment method a client used to remit funds (unless over £250,000), Bacs or Faster Payments, to ensure they are 'cleared funds' and from the expected source. Therefore, it may be day two upon which a firm can confidently make a payment.

Client top tip – Faster Payments can only be processed with 18 character references. Therefore if additional narrative details are required, another more suitable payment method should be selected.

Whether Chaps or Faster Payments wins out as the best method for transferring funds, a law firm's client may want to be very specific about which payment method is appropriate as, "My bank said the funds have left my account" is unlikely to satisfy a good legal finance team!

WHAT PURPOSE? RYANNE KERSTEN, BD AND MARKETING DIRECTOR

ven as a firm recognised for its strong ethos and B Corp status, clarifying our purpose and values and how best to articulate them became key for us while reviewing our brand.

But what is purpose? It is the answer to the 'why question', we were told. Why do you exist as an organisation? We learned quickly that 'providing legal services' and 'generating profits' didn't quite capture it.

Purpose goes beyond making profit and does not concern itself with what you do as a firm. It's about what drives you and what bigger issue(s) you aim to address through your service offering. You could say that purpose is found through a deeper questioning that points to a higher calling. It sounds a bit fluffy, I admit.

The growing interest in new, better and more sustainable ways of doing business has put purpose centre stage. The legal sector too will increasingly be held accountable by clients and employees for what it stands for and its wider impact. This relates not just to questioning our negative impact, but how we demonstrate our positive impact too.

Purpose needs to be true and genuine. It cannot be crafted by a marketing department or in a boardroom. It requires people across the firm to identify, share, evidence and validate one another's stories and experiences.

Once you have found your purpose and articulated your values, you don't want them to be just words on a wall. Instead make them part of your daily routines, behaviours, policies and operations – bring them to life. Even if some of it is aspirational, intentions in line with your purpose and values also need to be rooted in a willingness to put them at the core of what you do.

As referenced in a recent Kin&Co report on the importance of 'living' purpose, those

companies that do are now hugely outperforming competitors. Unilever found that "purpose-driven brands are growing ahead of the market" and "grew at twice the rate of the rest of the business." The report further says that if you do purpose right, the love that you receive from employees, clients, investors and communities translates to loyalty, productivity, dedication, unity and ultimately more profit.

Millennials will be making up 75% of the workforce in 2025, according to the World Economic Forum. Think of millennials not only as your own people, but also as your future clients – purpose will further gain in popularity and importance as they form the dominant part of your client base and come into positions of power.

Millennials want clarity, consistency and immediate visibility. They are critical, better informed, less loyal, brand focused and extremely economical with their attention and time. This is bad news if you mess up, but wonderful if you nail this and provide something of value to them, like a cool, ethical and sustainable brand they want to be associated with.

Purpose and values are primarily internal tools that shape and articulate your culture. Clients are not really interested in reading about them on your website if you can't put their relevance in the context of their own requirements and principles. Your brand is the vehicle to best express that relevance to them.

e sustainable e stage. The ntable by nd its wider negative mpact too. Clients are not really interested in reading about purpose and values on your website if you can't put their relevance in the context of their own requirements and principles.



Ryanne Kersten BD and marketing director Bates Wells Braithwaite **www.bwbllp.com**



Revenue: £24m Corporate status: LLP 148 fee earners, 249 total staff Offices: London

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COMPLIANCE DEMANDS MARTIN PALMER, THE CLOUD EXPERT

picture.

uidelines such as the General Data Protection Regulation (GDPR) and the revised Payment Services Directive (PSD2) are forcing law firms to reconsider the necessary actions required to meet their compliance goals. But too many firms are focused solely on simply 'achieving' compliance, and fail to consider the longerterm picture.

With the regulatory landscape constantly evolving, a continuous approach to compliance is required to avoid any unexpected complications further down the line.

However, there are several obstacles in the way of adopting a continuous compliance mindset, the first of which is the sheer number of frameworks and regulations to adhere to — the NIST Cybersecurity Framework, for example, has close to 400 specific requirements. Then there's the fact that internal teams may not have the right skillsets to translate compliance in the physical world to the virtual world.

So how can legal firms overcome these challenges? Part of the solution lies in cloud technology, which can make the journey easier through the elimination of hardware limitations.

Almost all technology-related business decisions nowadays have a cloud component of some sort, and compliance is no exception. Businesses across all sectors have realised the potential of cloud technology for reducing operational complexity, and these benefits can also be transferred to the world of continuous IT compliance.

Using cloud technology to monitor and control IT compliance offers a tremendous amount of transparency: being able to

Too many firms are focused solely on simply achieving compliance, and fail to consider the longer-term picture audit, query, alert and resolve any cloud infrastructure changes through virtual means is an incredibly powerful tool to have at your disposal. This helps significantly in the acceptance and continued adoption of the technology, and in the organisational approach to continuous compliance.

Cloud can also deliver cost savings while streamlining workflows through automating certain processes, simplifying reporting and cutting down on the number of compliance and reporting tools if needed.

More specifically, cloud technology can enable unification. A cloud-based platform can help firms to

integrate all their relevant compliance-based data and information into a single view, thanks to the ability to consolidate existing tools and data sources. When it's implemented in the right way, firms can benefit from an intuitive compliance dashboard that combines data sources and allows them to see what they're doing right, and where they're going wrong, at a glance and in near real-time.

Using cloud technology in this way allows firms to track their infrastructures and trigger alerts instantantly. With pre-defined rules and bespoke policies, a cloud-based platform can pull information and check it against the controls in place to identify any instances of non-conformities, making it simpler for any issues to be resolved.

Compliance is a tricky issue. With so many regulations and frameworks to adhere to, it can be difficult to know how to achieve compliance, let alone maintain it. Using technology — and the cloud in particular — to adopt a continuous compliance mindset is exactly what's required for law firms operating in today's fast-paced environment. Through agility and the unification of data, these firms can enjoy the peace of mind that they're operating in a safe, secure and compliant way.

ABOUT

Pulsant Enterprise class cloud computing Contact Martin on: 0333 270 5989 www.pulsant.com @PulsantUK



SRANEW START JANINE PARKER, THE BROKER

n March of this year the SRA announced its latest consultation on potential changes to legal insurance and compensation rules, some of which appeared in their previous consultation. The issue of professional indemnity insurance and the balance between affordability and public protection is, of course, an essential one. The SRA has stated that its proposals "could help reduce insurance costs for some firms, encourage new businesses to enter the legal sector and lead to lower prices for customers. Affording the high cost of PII, designed to cover all possible legal activities, as well as high premiums for 'run-off' insurance, can be especially challenging for smaller or specialist firms."

The first of these proposals is to reduce the maximum single claim limit to £500,000 (£1m for conveyancing). Let us consider this first proposal listed by the SRA from an insurance perspective, and provide a brief commentary and analysis on whether the objectives of the SRA could be achieved.

The SRA states that "98% of claims are settled for less than the proposed £500,000 single claim limit." Ignoring the fact that no dataset is ever perfect, and taking this statistic at face value, what is it telling an insurer? The data is saying that the vast majority of claims sit under a threshold of £500,000 and therefore it's telling you, as an insurer, that this is where the bulk of your exposure exists. Therefore, the vast majority of your premium charged will be weighted towards this first £500,000 limit of indemnity. Even offering a generous hypothetical discount of 30% on a £25,000 premium, you would save a practice £7,500, which would of course be welcomed. However, if you assume a firm may have 500 clients in a year, and supposing the firm choses to pass on 100% of this saving to their clients, the result would be a saving of £15 per client. It could be argued that you could save more money by restructuring your photocopier and telephony contracts.

More importantly, what would be the impact on public protection? Solicitors pay more for their professional indemnity insurance because they have more successful claims made against them. This is partially due to the breadth of cover that is provided by the Minimum Terms and Conditions of the SRA. These claims come from both individuals and financial institutions, and around 50% is from conveyancing. The majority of small high-street practices carry out conveyancing, and a reasonable guess would be that conveyancing accounts for around 35% of fee income. Even small firms may sell a property worth over £1m, if not significantly more, therefore the purchase of an excess layer would be necessary. The attachment point for these is currently £2m or £3m. If you lower the attachment point of an excess layer then it is certain the price will go up at a time when the excess layer market is increasing rates – let us not forget that there are still many claims that are in excess of £500,000.

Firms wishing to carry out conveyancing in areas with higher property values would have to carry a higher limit of indemnity anyway. Clients, whether individual or institutional, would insist on the higher limit for their protection. In addition, if a firm had ever previously carried out work where there was exposure above £1m, then it would also need to maintain a higher limit of indemnity. In short, it is possible that firms would end up paying more for their insurance than before. You could also easily have a scenario where a firm no longer has a sufficient level of cover for work it carried out five years ago. Finally, if a firm did decide to reduce its limit of insurance and cease dealing with larger transactions, there would be less choice for the consumer.

What about the small firms that don't carry out conveyancing and focus on low risk areas of work? Clearly, a £500,000 limit of indemnity could be suitable for these practices but it is highly likely these firms are already paying very little compared to others who carry out higher risk work.

Consultation that leads to more choice and better value for the public is always welcome but after this albeit very limited analysis, one has to question whether this one change could have adverse effects for the profession and public alike.



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DIGITAL DAYS Adrian Jones, the technologist



ABOUT

Tikit

Leading practice and case management provider Contact Adrian on: 01489 609 010 www.tikit.com @TikitP4W



n February 2018, LPM Legal IT landscapes reported that 84% of firms were either "confident" or "fairly confident" they had everything in place ready for GDPR. The route to compliance will have been unique to every firm, and will be ongoing.

There is no simple process that can be followed to ensure GDPR compliance and there are many different opinions as to what compliance means. Unlike, say, information security, firms cannot achieve an ISO27001 certificate to prove they are compliant with GDPR. Law firms have therefore been left to develop their own best practices, and

this is not always easy. After months of talking about GDPR – the challenges, the risks, the fines – what now? Well it is here, and here to stay, so we should make the most of it!

Law firms are in a highly trusted position, where the gathering, processing and exchanging of personal data is part of everyday business life. Reputation and trust are critical to your business, and need to be rigorously protected. GDPR

provides the opportunity to get to grips with data, to improve processes and procedures and give all data stores a regular spring clean. There is the added benefit of having been forced to look at data-handling processes in new and innovative ways, and also to think about digitisation with a move towards becoming paperless. The more business-critical benefit of the paperless journey is that digitisation means that firms who have perhaps relied on the postal service to deliver critical documents are now in a better position to be able to share and sign documents using digital portals. Not only is this route going to save firms time and money, it's also going to help them provide that greater level of customer service that their clients expect.

However, moving that data from paper to your case management system doesn't just mean that you are making things better for your customers. It's about making your business better too. Internal

systems used for processing data should be regularly revisited and enhanced as the regulatory requirements for GDPR become clearer over the coming years.

Investigate best-of-breed applications that integrate with your case management system. With higher rates of digitisation, these applications suddenly become worth investing in, perhaps in a way we haven't seen before.

These integrated solutions will not only continue to innovate

your data-handling processes but they, along with your case management system, will start to create a platform for success.

Systems that are more efficient mean improved profit margins, and innovation of technology means differentiation in the marketplace – an essential ingredient for firms' ongoing success.

Moving data from paper to your case management system doesn't just mean that you are making things better for your customers.

QUESTION TIME FOR COMPLIANCE NATASHA RAWLEY, THE FILE QUEEN

o, here we are in the week of the GDPR activation and wow it has been so busy at File Queen HQ at ADDS. By the time this column goes out, we will have helped over 600 clients adapt record management processes to bring them more in line with the GDPR regulation, and we need a desert Island break! I know we're all sick and tired of speaking about GDPR, but I wanted to take this opportunity to share with you some of the internal process we have in place at ADDS that have been part of our day-to-day processes for many years. They are not totally related to record management but I think may bring a little bit of extra help to you as a GDPR checklist for your internal operations on a security and data breach prevention level.

Do all of your team members, suppliers and clients sign in and out of site? Are supplier and clients' issues with security processed on checkin? If there was a data breach, would you be able to pull a list of all people onsite at that time and date? Are team members across all departments and levels security checked? Are suppliers escorted onsite at all times? Or are they allowed to just wander the site? Random suppliers onsite who have not been security checked by you are always a security risk and should be escorted at all times.

Do you ask clients for photo ID upon entry to the building. Are they who they say they are? Do you have a security office closure checklist for your practice? Is there a process for the last person who leaves the building or department, which can be ticked off and documented as complete? Are those windows closed? Are the desks clear? Are all computers switched off? Are the file storage areas and cabinets locked? Are fire exits checked? If you have a cleaning company servicing your office out of hours, what security checks do does it run on team members? Do you have a clear-desk policy for your practice, or do the cleaners have access to confidential information when you are not there?

Do you regularly check your team's PCs and laptops for locally stored documents? Best practice is that documents are not locally stored; not only for back up but also in case of a data breach. What if that laptop was left on the train or the PC stolen? Does it have client information stored locally on it? How will you know what information it is in order to alert the client to a data breach? Do your team members regularly empty their laptop/PC recycling bins? Best practice would be to do this twice a day. Again, if this computer was in the wrong hands, what documents would be in those recycle bins that could be easily recovered?

How often does your system request a password change? The minimum should be every 30 days, with strong password requirements such as upper and lower case, symbols and numbers required.

Are team members in the practice of regularly locking their PCs and laptops when they leave them? Even for a tea break? If not, this is a potential data breach. We all like some internet freedom but the hazards that social media sites and personal email logins like gmail can pose to an IT network can be devastating. Best practice would be to deactivate any access to these sites.

Are your team constantly reminded to run daily security scans on their PCs and laptops? Do they sign a document to say they have completed this daily? Every day? Do you control portable media devices on PCs and laptops, or can team members plug in USB sticks and run mass data downloads or upload without IT consent?

Personal mobile phones – are team members allowed to use personal mobile phones for emails or at their desk? What if a personal mobile phone went missing – what information would be on it that causes a databreach for you? Could a member of your team be taking photos of client information with their personal mobile phone?

All sounds very paranoid, doesn't it! But with the constant danger of a data breach, why shouldn't practices be paranoid? If you want to download the checklist tool we use internally for our team members, you can find it here: <u>www.archivestorage.net/news/gdpr/</u>.



ABOUT

ADDS Saving firms from paper hell Contact Natasha on: 0800 328 0272 www.archivestorage.net @filequeenadds



rradar Breaking the law

Gary Gallen, founder and CEO at rradar, on how an idea and some hard work blossomed into a partnership with AXA

hat started out five years ago in a conservatory in the north of England is now the disruptive firm your advisers tell you to watch. Gary Gallen, founder and CEO at rradar, stitched together all the leading technologies and best practices much hyped in the market over recent years – artificial intelligence (AI), blockchain, subscription packages for clients, multimedia services, and much more, to create a new type of law firm.

The dream was simple. Gallen believed that to have sustainable work, longer relationships and really help people, he would need to get rid of hourly rates and reduce fees and offer up more knowledge, in a modern way.

"Knowledge is much more freely available than ever before – instead of just searching online for 'what's harassment?' or 'I need help with a claim' to provide businesses with answers, I thought that information ought to be coming from a proper practitioner. Google may be right, but businesses shouldn't bet on it being up to date. And I was willing to give my knowledge to people."

But big dreams call for big pockets and investors were not certain it would take off. He says: "I went to around 29 funders – venture capital trusts, private equity houses, angel investment groups, banks and lenders – every single one of them turned me down.

"So, I remortgaged the house, took a huge personal loan, used up all my savings, maxed out all the credits cards and everything else you could imagine. I took online courses to build the first website myself and did my own marketing." From left to right: Gary Gallen, founder and CEO; Andrew Cameron, co-founder and chief legal officer, rradar





LPM FIRM FACTS

rradar Corporate status: Limited company

110 total staff

Offices: Hull, Leeds, Glasgow

Gallen says once the business model was viable, it was time to take the business out of his conservatory and friends' houses, and he opened the first office in Hull. Two years into rradar's journey, Andrew Cameron joined as the chief legal officer and co-founder. Gallen wanted someone to lead the legal arm of the business so he could focus on the business strategy and model.

And the fun doesn't stop there. At the beginning, Gallen wasn't just creating a law firm, he wanted to leverage technology and relationships with insurers to create a better proposition for clients.

"When I was a high street practitioner, I knew many companies were getting into trouble with the law, and insurance is a huge feature of that. So, I decided to develop 'designer' legal and risk management training platforms with modern insurance programmes that covered all the risk modern businesses face," Gallen says.

Insurance is just as archaic as we are in law, he adds. He proposed that a law firm and insurer could collaborate – and was able to convince AXA to team up. To do that, rradar reframed the way law operates, developing new products using the latest technology and delivering legal services the way the client want.

Gallen says the next generation challenge is to take knowledge, build it on a platform and deliver it with AI to educate and empower people. And that's just what rradar did, he says.

'grace' is rradar's working AI – users talk to rrace and it understands the questions they ask, their needs, what sector they work in, the type of business they are, and takes that data to provide specific and detailed information and case material. It uses technology and inhouse design, and is supported on AXA's Management Liability Policy. It's estimated that the platform has touched nearly 60,000 businesses across Great Britain and Ireland.

rradar is designed and written into the fabric of the insurance contract, Gallen

says, which is why it has so many clients.

It goes to show that innovation is not just for the magic circle firms with giant IT and R&D budgets and teams – if anything, he says, SMEs are more adaptable and ready to use things like AI and blockchain.

"Our aim is to turn law on its head. It's like an iceberg, people only see the tip – when you're in the courtroom wearing the gowns doing the litigation work – all the experience and knowledge is underneath and sadly only exposed, traditionally, when clients are charged huge sums of money for it." Gallen says the firm measures success by tipping the iceberg – it exposes knowledge but doesn't charge for that two-thirds of the iceberg.

"We use subscriptions and put people on education pathways. And the greatest success for us is when we can reduce the amount of court work we need to do."

Fewer clients in crisis means less time taken by them to investigate and crisis manage, he says. The real work comes from the thousands of clients who pay small subscriptions and want something more in depth - they ask for smart working, education and performance management instead.

"People don't like repetitive tasks – lawyers are the same and often become bored as practitioners giving out the same information every day, which is why creating grace also means freeing up fee earners' time to do the more sophisticated and challenging work. The work that we truly want to do and that will have a bigger impact on our clients," Gallen says.

rradar's offering doesn't just include fancy AI and strategic partnerships. It innovates in the other ways it works, such as the digital and physical spaces it

"Innovation isn't a plugand-done project, it should evolve." creates. The firm set up "stations", where clients can receive information online in different formats.

"It has infographics, downloadable howto guides, template documents, videos and podcasts. There are over 2,000 resources on our website," he says.

But even with the best information in the world, content is ever changing. Gallen says he could put two million documents online and "still get a hairdresser in Rotherham saying that a document is not quite right for their needs.

"Innovation isn't a plug-and-done project - it should evolve. So, we offer tailored services attached to our online content. "People can talk to us via live chat, email, face-to-face or use grace – whatever best suits their needs."

The firm also built a "genius bar," a bit like Apple, where people are encouraged to come in and sit down for a sandwich or cup of coffee and discuss stresses and challenges with rradar staff – who can deal with it right there and then, he says.

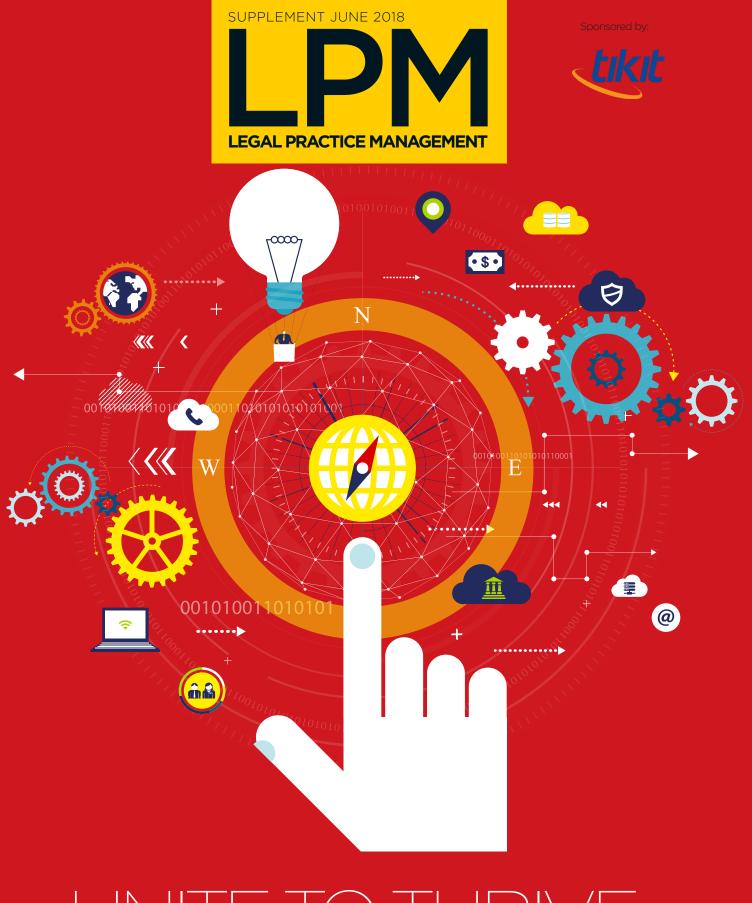
All of what rradar does, Gallen says, is about accessibility – clients or prospective clients don't need to book an appointment to come in. rradar stations promote problem solving and creative thinking by creating a welcoming environment to visit.

There are swings, pool tables, arcades – a relaxing and refreshing environment can stimulate the best ideas, or at least ideas worth trying, he says. "You can come in and soak up the atmosphere, recharge your energy and see what we're designing. We want to have open access on a physical basis as well as with the technology we use.

"If we were just trying to be a law firm with smart technology, we'd still just be a law firm. And we don't want to just be an insurer or broker either."

Gallen says that ultimately the firm wants to solve problems for clients, like any business. And the best way to do that today is by offering more than your services.





UNITE TO THRIVE

How can firms take advantage of a connected ecosystem?

COMMUNITY FOR CHANGE

Alex Williams, Partner for Windows product manager at Tikit, joins up the integrations of P4W to give firms a full view of the ecosystem

o business can survive in the market today, it seems, without innovating their products or services. But sometimes that move towards innovation can be slow because of the cost or time to implement. This means many firms could be losing out on that innovation advantage.

'Innovation' is quite a suggestive word, ask anyone what it means and there will be a different definition each time, says Alex Williams, Partner for Windows (P4W) product manager at Tikit.

"Innovation is a key element of Tikit's ecosystem – P4W is not only about its core functionality as a practice management system but by integrating with the best-of-breed providers it gives firms a competitive advantage to increasing customer satisfaction and efficiency."

With P4W as a firm's central platform, he says, departments that need specialist information or technology – for example, a fee earner needing to do a conveyancing search or one who doesn't have time to manually transcribe their dictations – can leverage best-of-breed providers who already have strong systems in place to get the job done.

Williams says: "Law firms have the opportunity to address what is causing issues for the business by utilising P4W's ecosystem to get through those challenges and create efficiencies across the practice."

KINGDOM OF WHIZZES

Integrating P4W with best-of-breed products has created a market leading practice and case management ecosystem of products, says Williams. "There's a definite culture change hitting the SME legal market at the moment – previously they haven't really had access to such a broad range of technologies compared with the UK top 100."

SME firms are starting to pick up innovative technologies and are becoming more adaptable to change – automation, digitisation and smarter working are all very ripe for harvest.

Williams says P4W integrations are about seamlessly passing data and reducing the administrative requirement to rekey that data. For example, last year P4W partnered up with InfoTrack, which has specialist conveyancing capabilities.

"Electronic submissions are instantly available and the firm can easily track the order's progress. Since that data is passed between P4W and InfoTrack automatically, there is no need for resupplying information across different platforms. With fee earners receiving updates it allows them to manage their matter progress more efficiently and address issues instantaneously that requires intervention" he adds.

Not just InfoTrack, but all of P4W integrations work to support law firms in daily tasks and help them adapt to smarter ways of working, Williams adds. For instance, Adobe Sign, part of the ecosystem, is a simple but crucial service that automates the process to get documents digitally signed by end-clients.

Later this year, Tikit is set to expand its ecosystem and launch an integration between P4W and The Link App - those who watch the Apprentice may be familiar with contestant Lauren Riley's communication and mobility solution for lawyers.

Williams says there are many ways that using Tikit P4W allows firms' structures to become more mobile. There's a lot to be leveraged with two-way case and document management syncing using P4W's integration with NetDocuments, allowing fee earners to continue work on documents outside the office (the first integration between a CMS and DMS of its kind in EMEA). But also with desktop and mobile time recording (Carpe Diem), financial insights and dictations (BigHand), document sharing platforms (Workshare) and so on.

EVERYONE INNOVATES

P4W is constantly evolving and expanding its ecosystem, to do this it's vital to listen to its customer base. Tikit's P4W client portal is a place where law firms can use the discussion forum to provide feedback directly to Tikit, amongst discussions with other firms alike.

Williams says: "We will also be launching a new feedback tool this summer, which lies within the Tikit P4W platform and will enable users to send feedback directly from the application itself at a click of a button.

"This simple but big addition will allow us to keep up innovating P4W and have a greater impact on the future of law firm efficiency and productivity by using requests or ideas submitted by our clients."

The user group is another strong form of communication between Tikit and its clients, he adds, and is the largest independent user group in the legal sector.

Users can discuss common challenges they face



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across the market and produce innovative and creative solutions to overcome them. A great example of this, he says, is the creation of a FormShare starter kit.

FormShare is an automated PDF data capture tool developed by Tikit using Adobe PDF technology. It allows the client to complete forms and submit electronically back to Tikit P4W, saving staff's time in manually inputting the information into their PMS - things such as full name, National Insurance Number, date of birth and address can be captured within an instant.

"It can create the client automatically in their practice management system, including matter details and can also assist with anti-money laundering processes and conflict checks. This has significantly reduced fee earners time spent doing administration tasks by up to 33%." A selection of user group members collaborated together to come up with the most common types of forms that could utilise Formshare's technology. By collaborating together, it allowed them to become innovative while sharing the cost and time burden that many SME's face that naturally prevents them from using the most up-to date technology.

The user group also feeds into what best-ofbreed systems are out in the market so that Tikit can consider what to add to its P4W ecosystem, says Williams.

"It truly is an ecosystem. Firms can make use of P4W as a central hub where processes can be automated and tasks fulfilled with the utmost care, security and professionality."

Innovation is made easy when ideas and people to help develop them are at your doorstep - and Williams says, with P4W everyone is a helping hand.

SMART ECOSYSTEMS



Simon Elven, commerical and marketing director at Tikit, talks about law firm flexibility and how to make processes stretch in the right direction with technology

marter working means enabling flexibility, creating modern work spaces and maximising returns from your use of new and existing IT systems. It's no surprise that cloud-first strategies have boomed across the globe as businesses seek to gain an edge on the competition.

Technology is more important than ever in the legal sector, and the pace of change continues to accelerate. However, as firms develop their technology stack to meet evolving everyday business requirements, the need to integrate previously separate systems and make legal systems and data available to staff, even clients, anytime and anywhere, is becoming more pressing.

Law firms continue to be up against cost pressures and maximising efficiency is a top priority. Tikit sponsored this year's LPM Legal IT landscapes report, which found that competitiveness and efficiency featured high on the agenda for firms surveyed - with case management technology offering the best value for money in achieving both. But case management solutions can and should be delivering so much more for firms.

So-called point solutions met needs at the time. But the resulting mish-mash of systems designed to fix and address individual problems is now failing to deliver a cohesive process and is negatively affecting productivity. The demand for integrated technology is coming from a number of different directions – last year the Land Registry's chief executive set out its priorities for a digital transformation of conveyancing, and expressed the desire to explore how to make the process quicker for the profession.

FUTURE PROOF

It's not efficient to have to enter and store the same data in multiple systems. However, integrated technology doesn't just address problems such as wasting time on double entry of data. It streamlines the entire user experience, creating an ecosystem that future-proofs law firms. A fully integrated solution is a crucial foundation for the future. Integrated systems are the cornerstone of mobile solutions and underpin automation that saves time and money.

One of the biggest challenges the legal sector faces now is around productivity – doing things well and doing them quickly. Automation ranked highly in the latest LPM Legal IT landscapes survey results in line with this industry shift. Yet, the survey found that only 16% of firms have invested in e-signatures. With paper signatures wasting on average 6.8 hours a week, we would expect to see e-signatures being a huge productivity priority for 2018 as well as part of firms' security procedures.

AUTOMATE UP TO SPEED UP

There are myriad potential problems that come from not using a tightly integrated ecosystem of products. A major one is the inability to automate and accelerate processes that are not joined up. Technology not only improves and automates processes, it can speed them up as well. Speed is a necessary requirement for the modern law firm in an age where consumers expect more instant responses. Having a robust practice and case management system tightly integrated with bestof-breed solution providers that can help you speed up individual tasks will be key to overcoming efficiency and productivity challenges in 2018.

Respondents to the LPM survey identified conveyancing as the number one legal process that could be improved by automation, highlighting further the need to maintain speed and accuracy throughout the conveyancing process. Consumers consistently cite conveyancing as the most complicated and timeconsuming part of the house-buying process, and law firms who can smooth this process and speed it up will be well placed to attract conveyancing business.

There are some key starting points if your firm is looking to the future of your technology ecosystem, depending on where you are in the refresh cycle and what you are looking to achieve:

1. Bring customer relationship management (CRM) into

INDUSTRY ANALYSIS

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the fold. One common issue arises when firms use their CRM system entirely independently of the practice and case management system. New client data is not identical in both systems, resulting in poor or failed business development activity later on. Most firms use a variety of systems and tools for CRM. But the tsunami of applications flooding into the legal market means that using point solutions, which are not tightly integrated with a single database, could cause firms huge issues in controlling and streamlining customer management processes.

2. If your firm needs to replace its practice and case management system, this is a great opportunity to make sure you take the time to understand which best-of-breed products your new solution might integrate with.
3. If you are looking to replace or invest in solutions that would normally sit outside your PMS, now is the time to get a clear picture of where your data is stored. It is a good idea to have a single data source, the

'one truth', within your PMS database. **4.** If your firm is not changing the PMS, but you are looking to introduce a specific piece of new technology that doesn't currently integrate with the PMS, speak to your PMS vendor. A good PMS vendor will be able to advise on whether integration is possible, or cost effective, and can give you some ideas about what other firms are using.

NEED FOR SPEED

As integrated ecosystems replace point solutions it is more important than ever to work in partnership with your PMS vendor, and understand which of your supplier's integrated solutions are available to you now, and which are in the pipeline. Working together, you can keep one step ahead on the innovation curve. The need for a technology ecosystem capable of delivering quality and quantity securely is no longer a nice-to-have. It's a necessity. Doing it right and doing it fast will drive your firm ahead of the competition.



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A LITTLE COMPETITION

More than 10 years after the Legal Services Act came into force, the English and Welsh legal market remains highly fragmented. With competition for work so intense, a small number of SME legal practices are making a determined effort to stand out from the crowd. By Richard Parnham.

emarkably, it's now just over a decade since the Legal Services Act 2007 (LSA) came into force. This controversial act was specifically intended to usher in a far more competitive and diverse legal services market in England and Wales.

But, during the 10 years that followed, it's probably fair to say that the legal services market hasn't evolved in the way many predicted. The 'big brand' new legal market entrants, such as AA and Saga, have failed to set the legal market alight, while the Big Four accountants currently employ just over 400 regulated solicitors between them – almost all of them in London. And, while more than 700 legal practices now trade as alternative business structures (ABS), many of these are long-established law firms, rather than innovative new disruptors.

The practical upshot of these various developments is that – in the main – conventional law firms largely continue to compete with each other. And, with the number of solicitors practices in England and Wales remaining above 10,000 for the whole of the past decade, it is vital that individual firms stand out from their competitors. Ideally, firms need to have a clear and distinctive selling point, such as one based on convenience, price, responsiveness, or another metric that is important to clients. **G** Having an online presence hasn't replaced our core services, but it does give our clients greater flexibility about how they receive them.

Stewart Vandermark, CEO, Nelson Solicitors

Thankfully, because so many firms continue to take a highly traditional approach to delivering legal services, the threshold for standing out from the crowd is currently fairly low. Take a current hot topic in legal regulatory circles, for example – price transparency.

According to an October 2017 study by the SRA, just 18% of the 1,146 law firms surveyed declared any of their prices on their website. Meanwhile, research undertaken by the Legal Services Consumer Panel suggests that clients' perceptions of price transparency was even lower - just 6% of those who had purchased legal services in the past two years had found price information on the law firm websites they visited. Any legal practice that declares such information is therefore very much a novelty among its peers.

One way in which law firms can offer a transparent fee structure is to offer automated online legal services. But, despite LegalTech gurus such as Richard Susskind advocating this approach for more than two decades, this 'clicks and mortar' method of legal services delivery has not yet gone mainstream. Notably, the previously hyped QualitySolicitors LegalZoom UK tie-up has never materialised, while even the Co-op has

largely opted for a telephone-based approach.

WEB WATCH

That said, a small number of SME law firms have now embraced online legal services, thereby demonstrating their commitment to delivering a cost-effective, accessible legal output. Two firms to go down this route are Midlands-based Nelsons and the Wigan-based multi-office practice Stephensons Solicitors. Both use what might be described as a blended approach to delivering legal services – standard documentation can be purchased online for a fixed price, but this can then be refined and customised by speaking to the firms' legal advisers for an additional fee.

"Having an online presence hasn't replaced our core services, but it does give our clients greater flexibility about how they receive them," explains Nelsons CEO Stewart Vandermark. Stephensons Solicitors' chairwoman Ann Harrison makes a similar point, adding that her firm's combined offering allows it to deliver on its brand values. "One of our values is that we want to be transparent in the way that we deal with our clients. We want them to completely understand what we're trying to do for them, and what their legal matter is all about," she says.

For law firms who offer mostly bespoke legal services, it may not be possible to deliver their services online, or publish an exhaustive pricing list on their website. But that does not mean they have to stick with hourly-based billing, with all the price uncertainty that this approach entails.

One firm that offers its clients pricing certainty is Radiant Law, a seven-year-old legal practice which began by advising on large and complex technology and outsourcing projects. "When we started out, we were told that it wasn't possible to do this type of work on a fixed-price basis," says CEO Alex Hamilton. "We did it anyway, and effectively moved the market. Now, clients expect everyone to do it." Because Radiant Law has never used timesheets, Hamilton explains, its fixed-price charging structure is based around a matter's value to clients, not just time spent.

"In the legal sector, this approach requires completely different thought processes to what's normal – but it's not a new idea to the rest of the world," he says. "It's basically how car manufacturing works: you figure out a good proposition, price- and value-wise, and then you analyse your proposal to make sure you can deliver it in an appropriately profitable way."

CLIENTS TALK

Pricing issues aside, another way in which law

firms can stand apart from their peers is in relation to client feedback. Today, while many SME law firms collect client feedback – often on an ad hoc basis – comparatively few have embraced true client feedback transparency to an extent that is commonplace in other industries. Indeed, even Trustpilot, one of the biggest review websites in the country, currently has fewer than 230 UK legal practices on its books. Law firms who agreed to be reviewed on this site, or others like it, are therefore something of a novelty.

But why should law firms participate in allpurpose review websites, given the risk that any criticisms of their service will be open for all to see? For firms such as Hodge Jones & Allen (HJA), such websites are useful precisely because they are aimed at 'average Joes'. Just as importantly, says HJA operations director Alan Geaney, the firm's policy of embracing open and transparent reviews allows it to 'walk the walk', in terms of its ethos of looking after the individual.

"We want to be able to point to the fact that we're open about what people say about us," Geaney explains. And, while he acknowledges that "there will always be someone with an axe to grind" – often because they didn't have a case – "we'd rather be upfront about that, rather than brush it under the carpet."

Even when HJA receives negative reviews on Trustpilot, the firm makes a point of publicly responding to the comments made. LPM FIRM FACTS

asb law Revenue: £11.54m Corporate status: LLP 79 fee earners, 127 total staff Offices: Crawley, Maidstone

LPM FIRM FACTS Radiant Law Revenue: £1.8m Corporate status: Ltd 30 total staff Offices: London, Cape Town LPM FIRM FACTS Hodge Jones & Allen Revenue: £17.7m

Corporate status: LLP

220 total staff

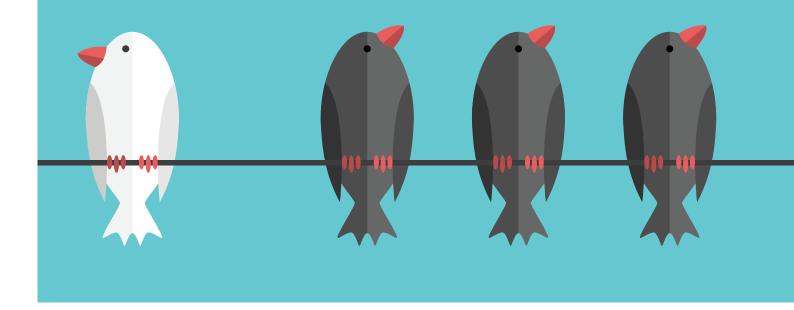
Offices: London

When we started out, we were told that it wasn't possible to do this type of work on a fixed-price basis. We did it anyway.

Alex Hamilton, CEO, Radiant Law

G Statistically, you're more likely to do well where people see that you've responded to negative reviews – that's generally viewed as a trustworthy action.

Guy Setford, co-CEO, Setfords Solicitors



This approach is mirrored by the 12-year-old 'distributed' legal practice, Setfords Solicitors, which uses Trustpilot as its sole method of collating client feedback.

"As a firm, we're confident that, in the vast majority of cases, our clients are getting a very good level of service," says the firm's co-CEO Guy Setford. "But the aim of collecting reviews is to get feedback – positive and negative. If we receive negative feedback, we'll consider what has happened, and then either post a response on Trustpilot or contact the client directly to address their concerns. Ultimately, what's important is improving the service you're offering. Statistically, you're more likely to do well where people see that you've responded to negative reviews – that's generally viewed as a trustworthy action."

Indeed, Setfords is so supportive of Trustpilot that the firm is currently upgrading its systems to allow Trustpilot rankings to automatically appear on the firm's website against the profiles of individual lawyers. As Setford explains, this approach not only allows its lawyers to build their own trust credibility profile, it also enhances their visibility from a search engine optimisation perspective.

"It's quite common for a potential client to search the name of a particular lawyer as opposed to the firm they work for," he says. "When they find their name online, hopefully they'll go straight through to the landing page with their profile on – including their Trustpilot rating." Even at a firm-wide level, Setford adds, being on Trustpilot has noticeably increased the firm's online visibility while also reducing its marketing costs.

"Since January this year, we've seen a 26% increase in leads compared with the same time the previous year, and a 13% fall in pay-per-click spend," he says.

Sometimes being different just means getting the basics right. Recent SRA research shows that clients' single most important priority is to be kept up to date with how their matter is progressing. But, all too often, law firms fail to deliver on this perfectly reasonable expectation. This issue is one that Matt Wistow, client relationship and business development director at Talbots Law, is very aware of, having worked across several professional services sectors during his career.

"Compared with the banking sector, where I previously worked, the professional services sector really hasn't focused on this issue," he says. "Without good communications, there's a vacuum. Clients naturally assume you're doing nothing and you're rubbish." For Wistow, this common failing among legal professionals is perplexing, given that it can often be dealt with by something as simple as a "20-second email," he says.

"Just saying: 'We've made good progress and we'll be in touch next week', can make a massive amount of differentiation and client satisfaction," he says. LPM FIRM FACTS

Setfords Solicitors Corporate status: Ltd Offices: London, Guildford

LPM FIRM FACTS

Stephensons Solicitors

Revenue: £19.89m

Corporate status: LLP

227 fee earners, 435 total staff

Offices: Bolton, Leigh, London, Manchester, St Helens, Warrington, Wigan

LPM FIRM FACTS

Talbots Law

Revenue: £10.9m

Corporate status: Ltd

106 fee earners, 210 total staff

Offices: Codsall, Dudley, Halesowen, Kidderminster, Stourbridge, Stourport, Wolverhampton

A NEW LEAF

Several firms interviewed for this feature also said they were working towards allowing clients to track their matters in real time, using online tools. Often, a catalyst for this development was the firm moving towards cloud-based practice and case management systems, where online access was an integral part of the solution's functionality. That said, one of the challenges of rolling out such a service was the difficulty of defining project milestones that could be used as a trigger point for a status update.

Of course, reforming the way that a law firm services its client can be a difficult process to go through – especially for those practices that operate as traditional partnerships. It is perhaps therefore significant that several firms interviewed for this feature are relatively new and therefore not weighed down by traditional thinking and legacy processes. But that does not mean it is impossible for long-standing legal practices to undergo changes that are equally transformative – as the experience of asb law clearly demonstrates. Over the past five years, this Sussex and Maidstone-based firm has adopted a sales and service delivery structure, streamlined its leadership team, made staff bonuses dependent on client satisfaction, embraced project scoping, and largely abolished the billable hour. "It's been an iterative process, and we're still learning and evolving," says Michelle Traynor, asb law's chief operating officer. But, in making these changes, the firm is now confident that it stands apart from its peers, while also delivering measurable value to its clients.

In other business sectors, many of the ideas adopted by asb law, and other firms like it, are already commonplace. Yet, in the curiously anachronistic world of legal services, simply adopting modern business practices can allow law firms to stand out from their peers. What is perhaps surprising is that the English and Welsh legal profession continues to have a choice on this matter – largely because the LSA has notably failed to usher in a new era of intense competition from new market entrants. Who would have thought that, 10 years after the act came into force, the legal profession would still have that luxury?

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Sarah Charlton, executive council, tutor and trainer at the Institute of Legal Finance Management, reviews the process for deregulating the rules for solicitors in the modern age

think it is fair to say that most people are aware of an impending change to the accounts rule, but do you actually know what these changes are and when we can expect to see them come into force? If you are unsure then please read on!

So what if I told you that the new rules are currently awaiting approval from the Legal Services Board (LSB)? The LSB must agree these changes first. What if the LSB feels the simplification has gone a step too far and is diluting consumer protection?

What is the story so far? The Solicitors Regulation Authority launched a "looking to the future" consultation which was broken down into several stages. The Accounts Rules review was launched on 1 June 2016 and closed on 21 September 2016. This entailed a full review of the Accounts Rules, which highlighted the need for them to be modernised. The review also considered how it could make the rules easier to interpret, apply and therefore follow.

NEW BEGINNINGS?

What does the proposal look like? Is it very different? Well, the new rules easily fit onto about 10 pages of A4! But don't get too excited as there will be a number of toolkits that will be published to support the new requirements. It's anticipated that the status of the toolkits will be such that, while they are unlikely to form part of the rules, the reporting accountants would need to consider any substantial departures from them. It will be interesting to see the content of the toolkits; will they merely state the obvious (black and white situations) or will they be radical enough to cover those grey areas?

The consultation included the redefinition of client money – more specifically money which would be held on account of costs and/or disbursements – which in turn would remove the regulatory and financial burden for some firms to have a client account.

In June 2017 the SRA published its response to the Accounts Rules consultation. The SRA recognised the need to reconsider its original proposal of redefining client money. So, instead of removing the protection of client money paid on account of costs and disbursements altogether, there will be an exemption process introduced to accommodate firms who only hold fees and disbursements relating to expenses incurred on the client's behalf.

On the whole, this has been welcomed by many as it is easy to see the benefits of removing the reporting requirement from law firms, who ultimately pose a lesser risk in relation to the protection of client money. It also demonstrates the SRA's appetite for listening to the results of the consultation and therefore making it a worthwhile process for all those who took the time to respond.

Had the redefining of client money taken place this would also have brought with it a change to the categorisation of money held on behalf of the Legal Aid Agency (LAA). The decision to rescind the redefinition of client money means that the new LAA rules largely continue to mirror the current rules. However, they have removed the rule where advanced payments for disbursements must be put back into the client account if the party providing the professional services isn't paid within a specified time.

As with any change, there will always be a number of rules which are subjective. So, if you take the suggested definition of accounting records as an example, there's a nice wide sweeping catch-all phrase "any other records or documents necessary to show compliance with these rules". So if you are naturally a belt-and-braces person then you are likely to have some colourful conversations with your in-house GDPR expert! On the other hand, if you are a data minimalist you are likely to have a much more relaxed approach toward what you need to keep. I can really see auditors struggling with the inconsistency between firms around what additional records they intend to keep.

TIME TO GET MODERN

The proposed rules also provided the SRA with an opportunity to deliver a well overdue



modernisation. The SRA must have been inundated over the years with law firms asking for guidance on which bank account their credit or debit card terminal must be linked with – client or office.

We have also seen a firmer focus on the introduction of third-party managed accounts, which has yet to really take off. I believe everyone has welcomed the removal of out-of-date references and processes. Rule 29.5 currently makes reference to the endorsing of a cheque – how many people even know how to open the crossing of a cheque to allow an endorsement to take place? While I can recall doing this some 25 years ago, I don't think I have needed to use it in the past 20 years!

So, how can I prepare for the anticipated changes? I know that I, as well as many of my

colleagues, have always applied the 'spirit' of the accounts rules in relation to the interpretation and application. I feel like-minded individuals who have been applying this approach will experience much less change than those who have been very prescriptive in their application of each rule in isolation. Placing greater emphasis on how the SRA Principles underpin the Accounts Rules would probably be a good starting point, as the basic Principles are focused on doing the right thing (as well as doing things right!).

So, how are you going to train your workforce? Strong compliance is underpinned by a strong culture and therefore my focus would start with how the Principles are translated into the rules, to get a feel for the spirit to gain. I think the new rules, on the whole, are a step in the right direction.



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are essential tools for his firm as it grows

AI FUTURE LOOK



Kate Briscoe, CEO at LegalBeagles and JustBeagle, reviews how disruptive technologies like blockchain and artificial intelligence will impact the legal sector



went to the Lexpo conference in April this year and was struck by the new technologies, ideas and innovations impacting the global legal

industry. There were talks about the positive impact of disruptive technology, which gave me great hope that not only might 'tech save us' but that lawyers will play an intrinsic and critical part in that process as the industry is propelled forward. The key areas already under consideration are essentially based around AI and blockchain, preferably both combined.

The shifting landscape means that some legal jobs will disappear but, at the same time, we will open up entirely new opportunities and legal enterprises, which will not only transform how we practice but also drastically improve the age-old problem of access to justice.

The recent events surrounding data usage on Facebook, among other tech platforms, has exposed that we need some rules and principles around the digital world – and as we begin to imagine different AI futures, there is little doubt that talented lawyers will constantly be required to help the citizens of the world navigate that digital maze.

The Lexpo attendees were mainly from top corporate law firms that are already well underway with their digital transformations. We even heard from firms running their own successful startup accelerators, which clearly demonstrates they are well ahead of the curve on innovation and embracing the dynamism of the startup world.

LEARN FROM THE BEST

Undoubtedly there is a trickle-down effect, whereby these smart technologies will become accessible to firms serving the retail sector. What does all of this mean for a high street or regional law firm, delivering predominantly consumerfocused products in a highly competitive and changing market?

AI can, we already know, potentially play a huge role in discovery and research, but only if you have optimised digital systems. Sadly, there was no mention of AI that can get down into the dusty cellar and start rummaging through the archived files!

enormous change afoot with the process of verifying personal identity, meaning anti-money laundering checks of the future will be almost instantaneous.

The use of smart contracts in future will also disrupt many areas of legal practice – the prime result will be cost and time reduction for law firms, which means lower cost, faster legal work and the ability to process and handle many more matters for clients.

This is a very good development for law firms and consumer/SME clients, but the industry must do far more to attract those clients in the first place by ensuring that firms have a strong digital presence and can easily be found by clients seeking legal representation.

A negative consequence of these developments is less opportunity for trainees and junior lawyers, who typically perform repetitive and cumbersome legal work. Their roles could easily be threatened by this new dynamic, which risks losing a flow of highly experienced lawyers further down the line. I have not yet seen any talk which completely addresses this supply chain gap.

The new technologies and changing political landscape will create new practice areas connected to data protection, cybersecurity, reputation management, scams and frauds, and so on. All of these have become more prevalent in the digital age, yet currently very few firms offer meaningful client services in these areas. Those law firms ready and able to thrive in this new environment will need to stand out from the digital crowd.

New methods of funding need to be explored to restore a balance to our justice systems, and innovative law firms can play a significant role in that process by taking advantage of efficient digital solutions. These firms will be wise to be specialists not generalists, as they will be able to take their instructions from a national audience if they successfully use online digital marketing to flag up their unique skillset.

Innovation will hugely benefit consumers as AI becomes part of daily life and data becomes democratised. This shift will see independent 'legal advice' freely available through online platforms so that the client can be very specific as to the level of legal service they require.

In the future, legal representation will start where the paying client relationship begins – after AI and other technologies have made it possible to have full knowledge of costs and risk via a digital triage process. This change will increase access to justice so that everyone can access the right high-quality help when they really need it and will feel more confident and informed about the services they instruct.

However, this is only going to be of practical use in firms that perform high levels of complex litigation and/or unusual work reliant on research. For firms offering standard retail work, conveyancing or private client work, how will a smart AI trawling through their records be of any use?

For conveyancing, the disruption will first come in

searches and land registry, which are ideally

land registries are already engaging with

suited to blockchain applications. Several state

blockchain providers to create ledgers for the

transfer of title deeds. The cost and time savings

significant and will dramatically drive down time

of a blockchain open source land registry are very

There is also potential for private 'permissioned'

blockchain technology being applied to living wills,

lasting power of attorney, trusts and probate. This

could be paralleled with AI to ensure accuracy and

fairness, thus avoiding many disputes. There is also

CHAIN REACTION

for the property transfer.

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SPONSORED EDITORIAL

IN THE KNOWHOW



Jon Poole, corporate and commercial associate at Teacher Stern, discusses how Thomson Reuters Practical Law and Westlaw are essential for law firm knowhow

aw firms run on information – from communicating internally and with clients, to keeping up with the latest reports, news and changes to law. If staff don't have access to the precedents and resources needed to get the job done it could mean losing clients, and therefore profit.

Jon Poole, solicitor at Teacher Stern, says Practical Law and Westlaw from Thomson Reuters are essential for business.

"They are the go-to starting points for the majority of our matters. The precedents and knowhow materials are very comprehensive and we know we're using the most up-to-date and well-researched information.

"It's incredibly important to keep track of developments in the marketplace and changes to the law, so it's very useful to be able to get quick updates as to what's going on and what could be expected around our key matters and practice areas," he says.

TIME TO RESEARCH

Something as fundamental to a smooth-running law firm as precedents should be quick and reliable – there's no room for error or inefficiency when it comes to a client's case.

"The volume of precedent documents was important, but also the knowhow and guidance that sits behind them – the whole package is very useful to us."

There are often unusual situations or queries in connection with procedural matters or settled legislation, which staff often come across but don't always have abundance of time to dedicate to researching, Poole says. Things such as Ask Practical Law, What's Market and the general current awareness materials are all useful and quick reference points.

"When we do cross-border work in a new territory, we use Practical Law and Westlaw as the starting points for our research and preparation. It is very valuable for us to have concise overviews and information on key differences between jurisdictions at the very outset of an instruction in order to inform our approach and our clients' expectations and understanding."

He says what makes it so quick and reliable is that it's focused. "You get a synopsis overview and can very quickly filter what's relevant to you and your practice. From there it opens up and allows you to go away and research the core legislation and cases."

"The layout is easy to navigate and wellstructured in terms of practice areas and resources. There are many resources available and these can be easily filtered in a number of ways."

The main saving, Poole says, is that fee earners can quickly pick up on the big changes without religiously following the legal media, legislation and the latest case law developments.

When time literally means money, fee earners shouldn't have to use their time and energies on collecting and maintaining information unnecessarily, if there is a reliable, well-maintained and comprehensive source, especially as it can be difficult to bill a client for that time. It's better for the client and for the firm's productivity if



FIRM FACTS

Teacher Stern

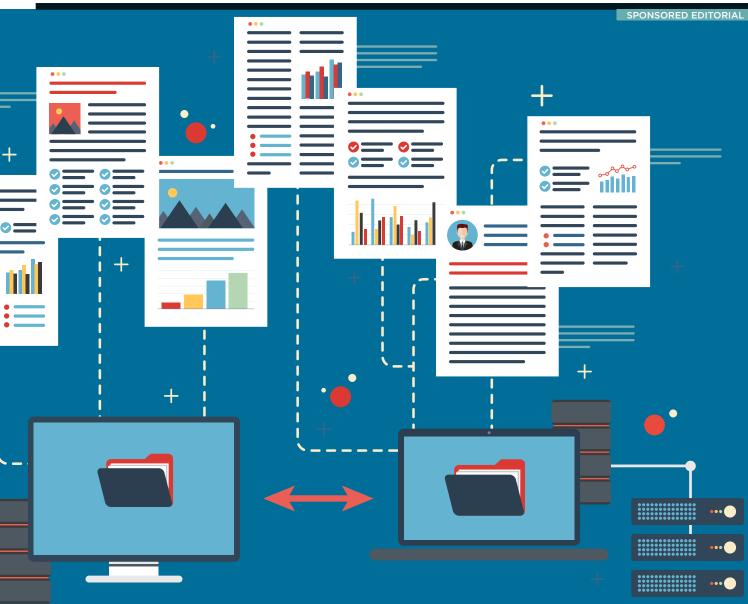
Revenue: £14.7m

Corporate status: LLP

86 fee earners,

122 total staff

Offices: Bedford Row, London



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THOMSON REUTERS® information is to hand when it's needed. And from a business perspective, the cases for Practical Law and Westlaw were far

stronger and more comprehensive than anything else in the market, he adds.

"Generally speaking, most firms our size and bigger use Practical Law – its strength in the market made it stand out but ultimately it's the functionality and breadth of use that sold it to the firm."

INGRAINED LEARNING

Teacher Stern has been using Practical Law and Westlaw for so long it's difficult, says Poole, to think about working in a world without them.

"We genuinely use it all the time. Beyond the time saving, it's a very valuable point of reference on many levels. The knowhow and updates are used to form the foundation of our internal training, as well as for updating our own internal precedents and practices."

It's hard for SMEs to devote a huge amount of time internally to training, with pressures on fee earners to hit targets and staff overall to keep efficient. For the firm to have guidance notes on recent changes, upcoming cases and so on, Poole says, it switches people on to that key information and vastly reduces the leg work involved in maintaining knowledge and current awareness.

"We are quite regularly able to use the material as provided – there's an enormous amount of applicability and usage," he says.

Poole says the firm is fairly confident with the Practical Law coverage and precedent provisions – should an unusual contract come across a fee earner's desk, then Practical Law and Westlaw can be leveraged even just as a good starting reference point.

He says: "It's easy to take it for granted as it's something we use every day and is easily available. We've looked at competitor offerings and Thomson Reuters offers more."

Just having that information available when law firms need it most could make the difference between a firm that is efficient and one that is less so – which means more time spent on client cases, where it matters, instead of searching for resources. And that leads to more trust from the clients.

HARD WALK

Martyn Wells, IT director at Wright Hassall, is a stage-four malignant melanoma patient, and in the midst of preparation to walk the 211-mile Severn Way in 10 days. There's still time to join in ...

revious top Briefing interviewee (and Wright Hassall IT director) Martyn Wells has always enjoyed a good stroll in the countryside - but has suddenly decided to switch the pursuit up a gear. In September 2018 he plans to walk the 211-mile Severn Way (the course of the river, from its source in the Cambrian mountains to its mouth on the Bristol Channel) in 10 days. In March 2017, he was diagnosed with malignant melanoma. He has had seven surgeries in 12 months, and began immunotherapy in May 2018. He and his many supporters are walking to raise funds for Macmillan Cancer Support and awareness of melanoma.

"I've always enjoyed the outdoors and have spent many days in the UK's hills and mountains," he says. "I've walked the Worcestershire Way before in a day – 31 miles and a 5,000-ft vertical ascent, but never committed to such a sustained and lengthy journey.

"I wanted a challenge that would be tough, need endurance and stamina, and that was somehow connected to where I live. The Severn Way runs half a mile from my doorstep. One day, walking the dog along the river, I looked first north upstream, then south downstream, and wondered: 'Could I? Should I?'"

A few months ago, his preparation was interrupted. "It was going well – lots of lowmileage, high-intensity walking – and even some running – until my cancer returned with a vengeance as a large tumour in my stomach. When my stomach was removed in March the surgeons severed my abdominal wall in a huge incision, so I've been recovering and allowing my core to heal before re-starting training. It's been a massive disruption to my plans and fitness, and a bit of a worry. I'm going to have to work very hard now to get ready."

But the wider UK legal community – as well as colleagues at Wright Hassall – is offering strong support.

"Each of the 10 days has a stage sponsor, who has committed to walk their stage with me. And friends, family, other melanoma patients, Macmillan staff, local press and radio, will join the walk each day, so it will be a fun atmosphere, winding through the beautiful British countryside." And anyone who wants to take part can join any day between 1 and 10 September, he says – and walk as much or as little as they want. There's no commitment to walk a full stage.

He adds: "Wright Hassall has been a pillar of strength to me. They provided amazing support while I was off, and were insistent on a soft return to work, despite my desire to get right back to the coalface. Now in my second period of absence, the firm is very patient and supportive. They know it won't be long before I'm back ..." As well as welcoming a donation from the firm's charitable trust, he thanks its social

committee, which he says has been "busy press-ganging staff to come and walk the final leg with me. Sorry folks ... it's one of the longest!"

The most difficult part? "For me this will be getting enough calories to keep me walking. I'll be needing over 8,000 calories a day – and without a stomach I can't eat any meal bigger than the size of the palm of my hand, so I need to eat at least eight times a day. This is going to be physically demanding, but also emotionally and mentally challenging. With so much support from peers, colleagues and the sector as a whole, and so much money for Macmillan Cancer Support on the line, there's a pressure to get the job done properly. I think there's going to be a lot of love, sweat and tears along the way. Just no blisters. Please.

"We're announcing new collaborations all the time. Ordnance Survey has been really helpful providing digital and paper-mapping resources, Macmillan is helping with media and fundraising, and there will be some celebrity involvement too."

Website **www.severnway2018.com** has both sponsor and registration pages. Anyone who'd like to walk needs to provide some contact details, for final details of start times and meeting points nearer to the event.



"I wanted a challenge that would be tough, need endurance and stamina, and that was somehow connected to where I live."



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