

MAY 2018

LPM

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BRAIN TRAINING

*Nick Lakhani, finance
director at asb law, on
killing the billable hour*

LPM ASKS

*Helen Pittard at 174 Law
discusses how she
created a CMS*



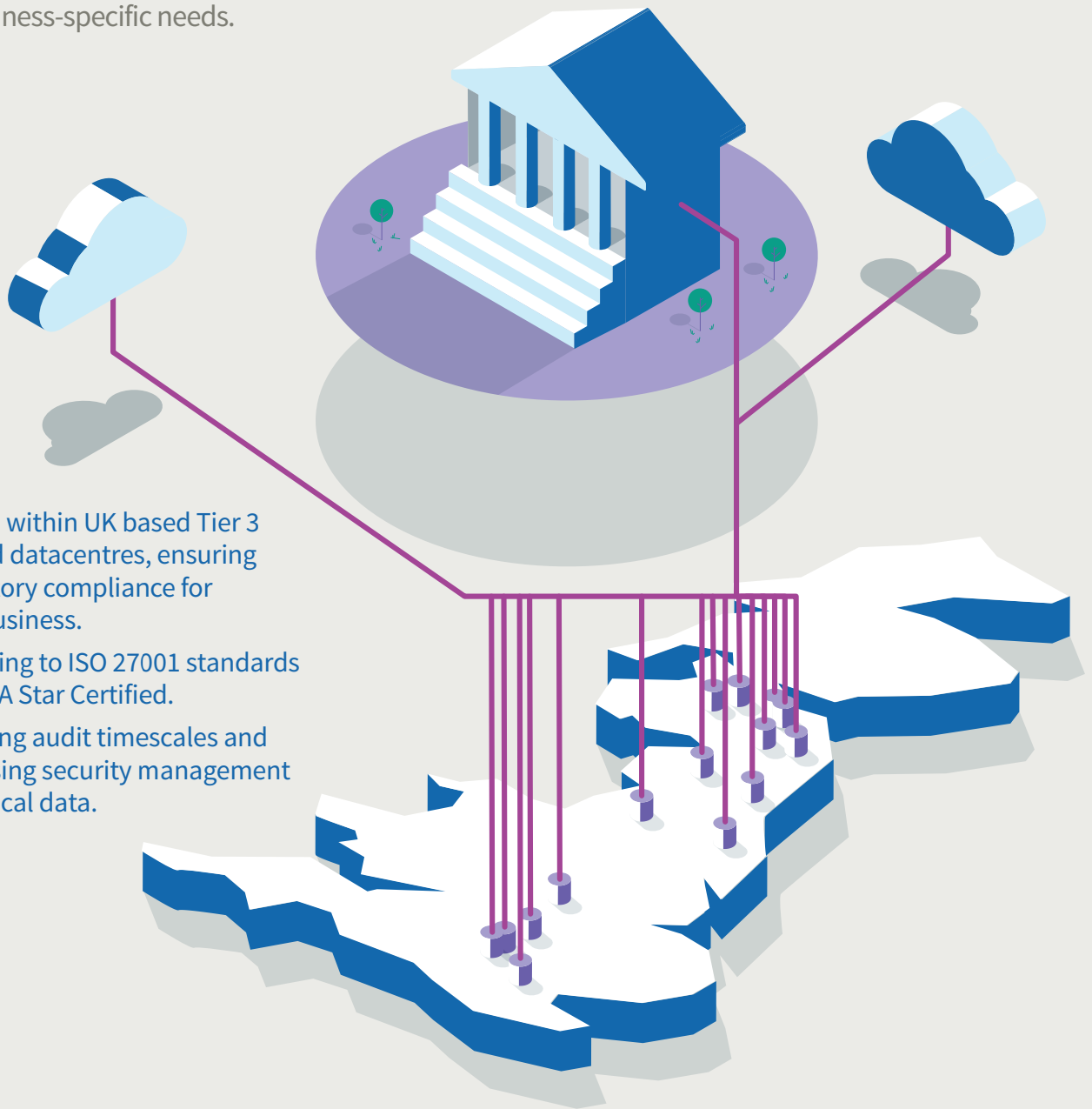
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*People are an important part of any business,
but how do SME law firms attract and retain
the best talent?*

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WELCOME

I hear that Brexit might be threatening to create some larger skills shortages in the tech and innovation space, so if SME law firms weren't worried about human resources before, perhaps they should be now.

The war for talent is ever growing. If you didn't know, I come from the States, and it is perhaps because of my alien status here that I feel the need to keep up to date on the UK's latest resourcing issues – exciting stuff, I know. I hear that Brexit might be threatening to create some larger skills shortages in the tech and innovation space, so if SME law firms weren't worried about human resources before, perhaps they should be now – especially as drivers in the market move SMEs to make better use of technology and innovate for their clients.

You should all be very familiar with LPM's HR guru Polly Jeanneret already, but you won't find her lurking on the usual page of this month's issue. How do SME law firms attract and retain the best talent to swim in their pools? She discusses this and much more, find her on p22.

As a little light news materialises about a certain firm floating (p5), Rosenblatt chief executive Nicola Foulston joins others for the 'your view' this month – answering our question about how SME law firms should change if they want to be competitive. Any particular industries you can learn from? Weigh all the responses against your own on p7.

More to change from Nick Lakhani, finance director at asb law, as he discusses why firms should kill the billable hour (p28). Could his New Law ways of working work well for your firm too?

And in this (potentially scary) month of May, read our GDPR supplement out now. Time is ticking to get compliant. Let us know how it goes!

Kayli Olson, acting editor
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About us

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

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We also run the popular **LPM conferences**, tailored for anyone working in management in SME law firms and ABSs. In 2018 they'll be in a city near you – on 17 May 2018 in Manchester. www.lsn.co.uk/lpm2018

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IN PRACTICE

SNAPSHOT WHATEVER FLOATS YOUR BOAT

This month we hear about some good efforts in the SME market to get to grips with modern law – appetite is growing, slowly but surely, for firms to move away from traditional partnership and perhaps adopt alternative business models. The courts too are continuing their remodelling in the digital space.

In April 2018, Rosenblatt Solicitors announced its plan to become the fourth UK law firm to list on the London Stock Exchange. The firm follows the initial public offerings of Gateley in 2015, and Keystone and Gordon Dadds in 2017. It's expected to be admitted to the Alternative Investment Market on 8 May.

Chief executive Nicola Foulston said in a statement that the firm plans to take advantage of the disruption in the UK legal market. "We're focused on improving margins and profitability, compared to traditional legal partnerships run by lawyers, which concentrate on revenue and often lack commercial expertise," she says.

In other news, the battle to digitise more court processes continues.

Baroness Hale of Richmond, president of the supreme court, says divorce should be done online as a "one-stop-shop."

Currently, after a decree nisi is granted, divorcing couples have to make arrangements for finance, property and children that are often very time consuming and involve filing lots of paperwork for many applications to go before different judges.

A one-stop-shop for family cases would enable applicants to file one form, preferably online, instead of navigating five different processes on paper.

Digitising the divorce process could eliminate thousands of hours a year of court time spent checking petitions.

She has also called for an end to using blame in divorce cases as it is "unjust and discriminatory." At the moment, it could take two years for a divorcing couple to finish the process – unless



they accuse their husband or wife of being at fault, usually through pleading adultery.

In Scotland, where couples only have to wait a year, only 6% of divorces cited adultery or behaviour compared with 56% in England a year, she says.

And to wrap up, **employment lawyers are calling to address delays in employment tribunals.** Lawyers say that claimants are having to wait up to a year for cases. The average time taken to deal with the first stage of the litigation process, and for parties to receive judgment, continues to increase as claims do.

The government's quarterly statistics for October to December 2017, showed 8,173 single claims were brought, up from 4,200 in the same period in 2016. **LPM**

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It only points in the right direction – theoretically speaking isn't change always right?

IN NUMBERS

Unwanted attention

Sexual harassment has taken place in at least 55 of the UK top 100 law firms in the last year, a survey by the Lawyer found

82%

of respondents said they were harassed by a partner

36%

said the perpetrator was a client

Respondents from

14

of the biggest firms said they witnessed or experienced harassment in the last month

Source: The Lawyer

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**NICOLA FOULSTON**
CEO, ROSENBLATT
SOLICITORS

The legal industry needs to embrace commercial management. The traditional partnership model suffers from a lack of commercial expertise with the focus on revenue, not profit. This is a result of management by lawyers who have rarely worked in commerce. The model also restricts talent rising to the top at a time when people increasingly want more flexibility in their working lives. The answer is more commercial management, working alongside lawyers, with a focus on improving margins and running the business more profitably to support growth.

**GARY MCINDOE**
MANAGING DIRECTOR,
LATITUDE LAW

Law firms are not typically known for modern ways of working. But it is so important for management teams to embrace external practices where these can benefit the business. As a small, boutique practice, a key differentiator for us is our ability to be agile and respond quickly to market changes. Firms need to be nimble to capitalise on the changing immigration environment as a result of Brexit; resulting in instructions from various new clients across a valuable sector.

**ADAM MAKEPEACE**
PRACTICE MANAGER,
TUCKER SOLICITORS

As a school governor, I am always struck about how the teaching profession prides learning – not for the pupils, but for themselves! It strikes me that teachers are much more adaptable than lawyers precisely because they are more open to the idea that their learning doesn't stop the moment they qualify, with CPD being an opportunity rather than an inconvenience. There is certainly competitive advantage in having lawyers who will embrace new ideas and methods willingly.

YOUR VIEW



As competition increases in the SME legal sector, from new entrants to deregulation set to hit the market – we ask LPM readers:

“What do you think SME law firms could learn from other industries to gain a competitive edge?”



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**ALAN LARKIN**
HEAD OF INNOVATION
AND TECHNOLOGY,
FAMILY LAW PARTNERS

Law firms can learn from retail, a forward-thinking industry which is using technology to engage with customers in a way they want to be engaged with. SME firms can survive against the volume providers and cut a value-based niche in a market. We use Advanced to explore how digital working could be pursued in all aspects of our client delivery. Connected services can allow data to be repurposed without repeated and manual inputting. Clients experience the convenience and efficiencies of a connected digital world in their private lives, which raises an expectation of service that lawyers must begin to match.

**STUART ELFORD**
DIRECTOR OF OPERATIONS
AND DEVELOPMENT,
GA SOLICITORS

Industries that have embraced technology have generally been able to offer their customer better value for money, but trying to compete on price alone is a race to the bottom. So we can be competitive on price but must compete on exceptional or innovative service. Aldo Gucci said: “Quality is remembered long after the price is forgotten.”

**TOBY HARPER**
CEO AND
CORPORATE SOLICITOR,
HARPER JAMES SOLICITORS

Law can benefit from structural changes in firm ownership. Instead of bureaucratic and cumbersome partnership hierarchies, opt for leaner and more flexible ownership structures that allow for business agility in response to market changes. Traditional law firms are evolving, but their approach to client service is still questionable – ultimately we have to be far more customer-centric and transparent. Even complex industries like software always have pricing pages. The bottom line needs to be put ahead of plush offices and the illusion of grandeur and focus on running and managing a viable business.

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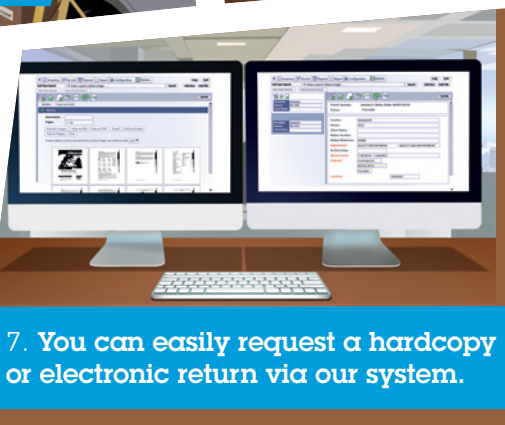


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ASK THE EXPERT



CMS SECRETS

Helen Pittard, head of dispute resolution and director of business development and marketing at 174 Law, talks about how she got to work building her own case management system

Q Why did you create a case management system in-house?

A The CMS came about after we acquired a new instruction from a large development company that had developments mid-stream, which we had to take over and manage. We didn't have a CMS system in place to manage the volume of client data or the timelines involved, but to purchase a bespoke software package to deal with that data would not only have been a huge financial investment, it simply wouldn't have been available to meet the time demands of the instruction – and we needed to manage this new property development project as soon as possible.

Q How did you do it?

A Alongside my practising work, I also

deal with marketing and business development – we were able to manage our clients from that perspective using a very standard CRM software called Act!. I knew that I'd be able to build a CMS from the CRM angle – I just needed to create the relevant fields and processes. And the software enabled me to do that. On top of being able to manage workflow and document production, we could create bespoke reporting – whether for our clients or development team. And at any given point in time, staff know what's been exchanged, where in the process work is, what documents we've got or need, and so on. It's a complete A-to-Z system to cater for the development team. Even if we instructed a software company to produce a system, because of the urgency of the situation we wouldn't have had

time to go through an implementation process and then create bespoke fields.

Q What was the biggest challenge?

A I learned as I went – there was no time to get training. I knew the CRM could manage the process because it's there from a sales point of view. So, we've got the prospect – how do we manage the prospect, what reporting do we need for that prospect? It's exactly the same with a workflow, just in a different context. After spending a lot of time creating it, my next thought was, 'what happens if we lose this?' If it's not backed up or something were to happen – like the server blows up – we have a disaster recovery policy to ensure business continuity, but I need to ensure we're secure. We've put safeguards in

place with our IT, so we have an outsourced IT department and four different forms of backup to cater for every scenario you could think of.

Q How well is it working for the firm now?

A It's as versatile as we want it to be – we have full control if we want to tailor it a certain way without being dependent upon any external software company having to develop the same. This means, for example, if a client wants a bespoke report, we can provide it. A new referral or instruction is put in from the outset – and all of our document production and project management is recorded in the CMS. And on a weekly basis, we send reports to our clients so they know exactly where every single matter is. That's now part of our service. **LPM**

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BOOK REVIEW

HABITS FOR PROFIT

Jason Rahman, practice manager at Sykes Anderson Perry, weighs the pros and cons of a third edition on profitability and law firm management

Of the major players who have fallen by the wayside over the last few years, it was bad management that ultimately brought their demise, not lack of work.

A well-managed firm will maximise profits and it will normally follow suit that it will be a great firm to work for.

Of course, the poorly run firms can make good money, but many are either sleeping giants and have no idea of their realisable potential, or are happy as they are. This book aims to nail both how to manage a firm better and how to maximise profitability.

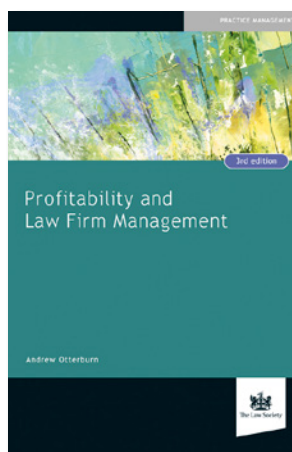
The fact that this book is now in its third edition – first penned in 2002, then 2007 – begs the question, what new advice or facts does it contain that the previous versions did not? Having not read either earlier edition I cannot comment precisely, but having read this one, I can't think of any factors or advice that would have been absent in the first editions.

The book is mostly silent on marketing suggestions, and there's nothing about the use of information technology in the modern law firm, which prompted me to have a quick check that I wasn't reading the 2002 version. While I don't think it warranted a third version just yet, it does not mean this is a bad book to read. There's something here for everyone, which makes it more of a reference book than a book to read in its entirety.

In an ideal world you would read this book on the formation of a law firm, follow its advice and you would find out that you had an uncle called Bob. In reality that's not how it works. People evolve in and through law firms, take bad habits with them, and learn bad habits from their peers. As the book very accurately portrays, time and time again, lawyers are not necessarily good managers. They are normally great at what they do – fee earning.

Many drop off from fee earning and aim to be the head of a departmental operation – for example, HR, IT or marketing. They enjoy the role and can be great at it, but they usually fail to see they are losing thousands of pounds of fee-earning time by deciding what colour to paint the walls instead of delegating to a facilities or practice manager. However, with the right time, budgets and constraints, it can work very well.

The book also contains personal insights and experiences from law firm managers and directors. They are great if you have trouble sleeping but should be taken with a pinch of salt. Anyone getting a full page in a book is either going to over dramatise and recount a worst-case scenario in their



Profitability and Law Firm Management, third edition, by Andrew Otterburn

Publisher: Law Society Publishing
Publication: May 2016
Price: £59.95



Reviewer: Jason Rahman, practice manager, Sykes Anderson Perry

working life or tread carefully so as not to rock any boats.

Another fascinating suggestion is a partner retreat. If this works for anyone, please do let me know, but if you need to be eating marshmallows in the middle of a rainforest to encourage good management something is definitely wrong at a higher level.

Getting the whole firm on board is paramount. The author's advice on a questionnaire is great and ensures all have the chance to have their say. You will be surprised what good ideas employees can have on making the firm more profitable, and an all-staff idea-storming session can produce some great suggestions. The book also contains some very good summaries and charts on understanding the financials, which is vital. Most lawyers don't have a clue about the figures and will nod their heads at the annual meeting with the accountants and ask whether it means they get more drawings. The book's biggest strength is in the summaries at the end of each chapter. It would be well worth collating them and working from them as a guide.

Having worked in the environment for 25 years, I can relate to most of the author's comments and this book is certainly worth keeping, with the aim of trying to implement two or three of the suggestions.

But the book is dated and needs a modern twist, perhaps some guidance on topics such as becoming a paper-light firm and using the right case and practice management systems.

It contains good advice, in a nutshell: get everyone on board, sing from the same hymn sheet and practise what you preach. If the firm is still not profitable after that, then please book me onto that retreat! **LPM**

WHAT IN THE WORLD?

STEVEN TREHARNE, MANAGING PARTNER



We have all been inundated with scaremongering about the coming of the robots and machine learning and how they will have a catastrophic impact on our firms, our people, our work, our revenues and ... our profit!

Putting to one side the incredulity of that statement, I always find it helpful to 'go macro' and look at what is happening out there, in the world of non-lawyers.

As an example, an American university has been able to store millions of books on a single drop of water. I dare you to take that concept back to your IT department and ask for a proof of concept.

Mark Prost, in a laboratory in Amsterdam, produced the first lab-grown hamburger – four years ago it cost \$325,000 to make, and tasted like shoe leather. The latest version costs \$11 and tastes a little better, more like a Burger King.

So what? The truth is that every sector will transform. New entrants will change the rules of the game forever. Skype came into the market and gave away the core function of the telephone for free. It now handles 40% of global voice traffic and employs 1,600 people. BT has more staff than that in its complaints department! Skype is a disruptive business.

In China they are building large skyscraper hotels in 19 days. The whole thing is prefabricated in a factory and assembled onsite like a massive Lego set. Investors are unwilling to wait the usual 18-month lead time as it might cause them to miss the demand in the market. The only issue is that it takes the lawyers two months to prepare the lease paperwork.

Will you be a business enabler or restrictor? Just think about your car. What does it do? One could argue that it provides a public service, in that 90-95% of the time it

keeps the road underneath it clean and dry! Will cars become self-owning assets, to be used as private self-driven 'chauffeured' vehicles, always on the road and in use? How will that affect the balance sheets of companies that have office cars or fleets of them? What is the potential legal impact? Where is the stream of new legal work?

It was reported in March that Bryan Cave Leighton Paisner had achieved a successful outcome after a 12-day trial (in the high court), in which relevant documents were identified by a computer. It used a machine-learning technique called

predictive coding. That is 'sick', as my kids might say! Or is it?

It is hardly building a hotel in 19 days, or growing a Big Mac in a lab, or having self-drive vehicles.

So what? I think it is time we sat down with our clients to find out how the future may affect them and help them to plan around it.

Parallel with that conversation, we probably need to consider how those changes will affect the legal work we provide. Where are the opportunities?

As the global futurist Rohit Talwar has said: "There is a time in life when you have to open the door, and let the future in." **LPM**

“ Investors are unwilling to wait the usual 18-month lead time as it might cause them to miss the demand in the market. ”

ABOUT

Steven Treharne
Managing partner
Mogers Drewett
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JOANNA KINGSTON-DAVIES, GROUP CHIEF OPERATING OFFICER



It saddens me that, in 2018, we still refer to mental health as a separate issue to physical health, rather than just 'health'. Our health is precious and cannot be taken for granted. In my view, issues of physical and mental health should not be treated any differently, yet there is still a level of stigma surrounding mental health that is alarming in this day and age – and that needs to be broken down.

Focusing on just three very common aspects of mental health, the junior lawyers division and LawCare have both published alarming statistics about stress, anxiety and depression in law firms, and have recommended the implementation of well-being programmes and mental health first aiders in every firm. I couldn't agree more.

Someone recently described the impact of stress to me with the analogy of an elastic band. We get stretched and stretched but once the edges start to fray the damage is irreparable and, although the band still stretches and works, it's permanently weaker and therefore more vulnerable. If the band snaps altogether, there's no going back.

I'm the first to admit that I'm completely addicted to my smartphone, and I'm pretty sure I'm not alone. Smartphones have become the norm and they facilitate and expedite so much in life, yet they also make us accessible 24/7 and take away our ability to disconnect, slow down and relax. In the days when lawyers wrote to each other by post, the speed of turnaround was much slower than it is now, when society's expectation is invariably for an instant response.

Smartphones are just one additional burden facing lawyers and the teams managing law firms every day. The pressure upon them – of time recording and accountability, regulation, cashflow, new work pipeline, managing and feeding teams

work, and ever greater client demands, to name but a few – is taking its toll.

Life has got quicker at a time when, in the legal services sector, traditional career paths and routes to ownership are disappearing and young lawyers wonder what they are working so hard for. It is incumbent upon us as both employers and support functions within legal services businesses to ensure that we give our teams the support and help they need in a much more proactive manner and more holistically than we might have done previously.

The implementation of a wellbeing programme does not necessarily have to be a costly exercise. A genuine focus on wellbeing within the workforce is also really helpful. This can range from the implementation of activities like mindfulness, yoga and pilates to a campaign to focus on healthy eating and access to gym memberships.

We can ensure that our employees are encouraged to take at least a fortnight's holiday each year to decompress and switch off properly – and check that they all take their full holiday allowance. We can also insist that tasks are properly transferred to a colleague in someone's absence so that they don't have to pick up work while on holiday because they feel that there is no other option available.

Finally, the simplest steps are often the most effective:

- Ensuring that we can all recognise, and have a process to act upon, the signs and symptoms of stress, anxiety and depression
- Quite simply asking someone if they are ok – and making sure that people know that it's ok not to be ok and that they will be fully supported
- Taking the time to listen.

It's 2018 – let's break the stigma. **LPM**

ABOUT

Joanna Kingston-Davies, COO
Jackson Lees
www.jacksonlees.co.uk




Jackson Lees

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LOVE IS ALL YOU NEED

CLAIRE SMITH, THE CLIENT SERVICES CHAMPION

On my first day at Moneypenny, Beth came to see me. Beth, who works in our legal team, had been my receptionist when I was a client of Moneypenny. In her hand was a congratulations card and a bottle of wine she'd bought for me, and with a hug she said: "Welcome to the family." This isn't something she'd been asked to do, but that she'd had decided to do because she thought it would be nice.

I was honestly blown away. It was so thoughtful and in one act illustrated the positive impact that a great workplace culture can have.

I recently talked about this at the LPM conference in Birmingham and shared our experience of how, through culture, we can offer our clients the very best customer service. It's something that the company co-founders, Ed Reeves and Rachel Clacher, have been firm believers in since day one. Their ethos is, and always has been, to create a company that they would love to work for and a company they would love to work with. Internally we call this 'Moneypenny love', and it not only provides the foundations for our company culture but also guides everything that we do.

Why? We know that happy staff equals happy clients. When employees feel happy, safe, supported and empowered they will shine their absolute brightest. Beth is the living embodiment of this – every company should have a 'Beth' approach to customer service.

A couple of weeks ago, for example, Beth sent one of her clients who was expecting his first child a 'dad-to-be survival kit' and bought her entire team a bunch of flowers after a particularly busy week. She also regularly receives 'thank yous' from her clients, with one legal firm recently ringing us to praise Beth for the rapport she had built with a caller who was looking for a new solicitor. Relaying what the caller had told them, the client explained that Beth had instantly made her feel at ease and, having spoken to a number of other firms beforehand, said that Beth was the first person who had made her feel like she genuinely cared and didn't just view her as a financial transaction. As a result the caller decided to instruct that firm of solicitors.

And there are hundreds of Beths here. Beliefs and values attract other like-minded people – and we focus on recruiting people who emanate a 'can do' attitude. In my first month at Moneypenny I was taken out for dinner by various colleagues, all keen to make me feel welcome, and after hearing I was staying at a hotel for a few nights was even invited to stay in the family home of one member of the team. This incredible drive to go above and beyond the 'norm' is what makes us us, and it separates a good business from a great one. Our very first receptionist, Lynn, still happily works here after 17 years. We have a (growing) list of names on our 'wall of fame' celebrating those who have worked at the company for over 10 years – if staff are happy and engaged, they stay here.

Some of this may sound very simple, and that's because it really is. Putting so much effort into looking after and rewarding our staff has a great return for us, and the same can be true for any business. A recent study by the University of Warwick, for example, found that happiness led to a 12% spike in productivity, and a quick internet search shows a whole host of academic research linking staff happiness with other tangible benefits like high morale and low absence rates. It's a virtuous circle: if you love coming to work, you will love your job and clients will love what you do for them – whether that's at a law firm, a marketing agency, a veterinary practice or an outsourced communications provider. In short, a little bit of (Moneypenny) love goes a long way. **LPM**



“ Putting so much effort into looking after and rewarding our staff has a great return for us, and the same can be true for any business. **”**

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When I speak to law firm management about their business intelligence (BI), management information (MI) and reporting approaches, I'm regularly asked about what other firms do well. People naturally want to learn about best practice, or better practice, from other, similar firms.

However, the question that is much less frequently asked, but which I think is equally – if not more – valuable, is “what mistakes do you see other law firms making?” This month I thought it might be helpful to answer that question for you. So, what are the most common mistakes we come across?

1. Treating BI/MI as a technology issue

As is the case with so many supposed ‘IT projects’ these days, implementing a new BI or MI solution is not really about the technology. Success is far more dependent on the culture of the organisation, the clarity of the goals and the implementation of change management, than it is on the technology used.

Purchasing a clever piece of the latest BI technology is no more useful in itself than a prospective self-builder purchasing a hammer. That is just the start of the journey. If you want your house built inside the next five years you might want to consider who the architect will be, who will project manage, who will do the plumbing and who will design the interior? Generally speaking, in each of these cases it will not be the person who is best at wielding the hammer.

2. Concentrating on presentation

There are many fabulous data-visualisation tools on the market, but in the hands of the wrong people they will only result in faster access to (slightly) prettier pictures. Where is the business value in that? Great-value management information presents the right information to the right people at the right time, to deliver the desired actions and outcomes. While a great-looking presentation can help in user adoption, and can certainly simplify interpretation of information, many BI projects end up delivering no more than lipstick on the proverbial pig.

3. Forgetting resilience

The most common reason we find for law firms not considering implementing true firm-wide business intelligence is that “our FD (substitute financial controller/IT manager as appropriate) provides all the information we need on a monthly basis.” Ignoring the fact that once-a-month information is never actionable, and also ignoring the time usually spent by said person in producing that information, the single biggest issue here is resilience. Invariably, when that person leaves, the firm ends up starting again with a new FD/FC/IT manager re-inventing the same old wheel in a different spreadsheet.

4. Starting with the wrong outputs

It is a regular hobbyhorse of mine, but I will repeat it again here, because I think it is so important. BI, MI and reporting only exist in law firms to help management and the lawyers themselves to achieve their goals. If goals are not determined, and more importantly agreed, at the outset, then all the reports and pretty graphs in the world are not going to change behaviour in the desired direction. Any successful human endeavour needs to have clearly defined goals (otherwise how does anyone know it was successful?), and yet I continue to come across projects that do little more than retrospectively report on failure to meet the previous month's billing target.

Life is all about making mistakes, but success in life comes from learning from those mistakes. Law firms considering their future BI and MI systems have the option to learn from the mistakes of others, or to make those mistakes first for themselves. Which one will you be? [LPM](#)

DO IT YOURSELF

DARREN GOWER, THE TECH GURU

The one thing I look for when purchasing anything relatively complex (so in reality that's any legal service), is transparency. There's always an element of uncertainty that the average client experiences when engaging with a law firm. What will happen? When will it happen? How will I know things are progressing?

Traditionally the way a customer answers these questions is to check in with their law firm throughout the process via phone or email. This is fine, but it presents us with a few challenges:

- It takes time out of the customer's day to proactively make that effort, and to frame and present their questions correctly
- It takes time out of the law firm's day to handle and respond to queries in a timely fashion – time that could be better served progressing the matter itself rather than providing updates.

The utopia has always been for customers to access information themselves and to experience comfort by being able to access up-to-the-minute progress reports around their own matters. It's a noble goal, but one fraught with potential issues, such as how much information does the law firm make available? Too much information might be confusing. How can the firm make information available in an easily understood – and easily accessible – format?

Despite technology moving at a rapid pace, law firms have been slightly reticent to make such solutions available to their customers. The perceived complexity and price have often slowed down the uptake.

But there now exist self-service portal products that can provide a clean, clear and user-friendly approach to self-service. They can be controlled by the law firm to ensure that only relevant information is displayed. It's a true reflection of the data held and used in the firm's own internal case management system. And vitally, these solutions do not break the bank.

There's now, frankly, no excuse for law firms to not provide the self-service experience that customers have been craving. Self-service is here and should be fully embraced – the barriers to entry have been worn away. Imagine a world where ...

- Your customers can check in on their matters at any time, from any place, with zero need for your expensive lawyers to provide one-to-one advice and updates
- The level of information provided is balanced just right to provide confidence but without introducing more questions or complexity
- Your personal connection with your customers is amplified to create a strong and lasting relationship, with no manual intervention actually required
- Your overall offering and marketing is enhanced by the genuine offer of a simpler, slicker and more friendly service experience.

So, let them do it themselves! **LPM**

“The utopia has always been for customers to access information themselves and to experience comfort by being able to access up-to-the-minute progress reports around their own matters.”



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It's May already! Summer is nearly here and the evenings are so much brighter. GDPR has no doubt been breathing down all of our necks but it's never too late to implement changes. Check out our GDPR-dedicated page for assistance.

I want to share with you a recent experience from a visit to a legal practice. This particular LPM was very frustrated with not being able to get new processes signed off to implement some GDPR changes, mainly for investment reasons. The fact the company were at risk from fines were irrelevant.

On this particular visit I asked the LPM what she was currently working on. Their biggest corporate client had demanded that the firm should be ISO 14001:2004 certified in order to continue to work with them, as this was their biggest client the managing partner had seen the decision as a no brainer. I asked the LPM if she had thought to use the ISO 14001:2004 in order to push through some of the GDPR process changes she had been so worried about implementing. She looked at me, rather confused. I saw this as the perfect opportunity not only to get some of the firm's environment policies in place but also to integrate these processes with some much-needed GDPR changes.

Here are some examples of the changes:

• **Secure destruction cabinets onsite** – We supplied the firm with three secure destruction cabinets for the firm's files/paperwork to be securely destroyed. This not only meant that paperwork was shredded and recycled in line with a great environment policy, it also meant less of a worry with regards to data breaches, as documents containing important information could now be placed into a secure destruction bin

and cross shredded with a secure-destruction certificate. Double whammy win!

• **Electronic recall of files rather than hard copy**

– The decision to order electronic files from archive (scanned and uploaded to an encrypted EDRM site) rather than hardcopy was taken to lower the environmental impact of the firm's needs, but at the same time this created better accountability as physical files were left safe and sound in archive storage (the practice had issues with files coming back to the firm and being lost/not returned to archive). The electronic scanned versions were uploaded to ActiveWeb, which not only meant better efficiency but also that the file was hosted on a secure encrypted platform with a full audit trail. Security access could be locked down on a departmental or individual user basis, which meant security accountability.

• **Retention schedule review** – The LPM was rather intrigued when this was brought up, how on earth does this influence our environment impact? Well, I said, it costs money, energy and resources to store hardcopy files both offsite and on your site. Storing files requires space, space requires electricity, security, heating and so on. A lower volume of files means a lower environmental impact. We started by viewing the storage areas in the office, a third of the files stored in the office were past their retention period. By destroying these files they not only lower their environmental impact but also free up valuable office space. I also brought up the fact that the firm was expanding and thinking about moving next year to accommodate this, when they just need to lower their storage area onsite.

So if you don't have the support of your firm to implement vital GDPR processes, there are always ways to integrate these changes to meet needs. **LPM**

THE POWER OF PROCESS

DAVID GREEN, THE STRATEGIST

Much of the work performed by solicitors is often difficult to automate or systemise as it needs technical expertise and skill to deliver the right advice to the client.

However there are a number of routine tasks performed across all legal services (case opening, money laundering, updating the client, closing/archiving and so on) and there are a range of legal services (conveyancing and debt recovery) that largely follow the same path from case commencement to conclusion.

Establishing more efficient ways of processing such work is not complex and any spend needed will deliver a return on investment and improve profitability.

Medium to large firms often have the budgets to fund technology to gain efficiencies that technology can bring to business processes. Smaller law firms are often unaware of the technology available or believe the costs of implementation are prohibitive (often not the case).

It is important not to confuse process efficiency (working smarter) with workflow case management (step by step case guidance enabling bulk legal work and routine tasks to be undertaken by systems and junior case handlers and a directed supervisory structure).

Business process efficiency is about identifying routine tasks in your firm and developing processes or introducing technology to reduce time spent on routine tasks without deteriorating service delivery. Importantly improved efficiency delivers increased profit through better use of resource or removal of unnecessary resource.

Implementing process efficiency is not just about building systems or using technology to remove headcount. While this may be a by-product of achieving a more efficient way of working but it can also result in freeing up time for case handlers or support staff to concentrate on other important tasks. In particular, increasing the amount of fee earning legal work for your case handlers is the cheapest way of improving profits of your firm – as you are using resource that is already paid for.

If a firm has not considered what technology is available or what systems they can implement to improve efficiency, they should do so. A walk through the firm from how a new client is processed through to the final billing of a client is a worthwhile, revealing and important task to undertake.

Through looking at the processes adopted by your staff and talking to them about how they do their job and what frustrates them will immediately reveal where your firm can improve what it does. Some key areas to consider are, outsourcing tasks, case management, new business, administration and support, and technology.

The Strategic Partner works with firms to help them identify where they can make savings in their business and achieve smarter ways of working to help fund growth or simply reduce expenses. Whether engaging an independent expert or doing this yourself, it is a process that every firm should undertake annually. [LPM](#)

“ *Business process efficiency is about identifying routine tasks in your firm and developing processes or introducing technology to reduce time spent on routine tasks without deteriorating service delivery.*

”



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UNDER THE UMBRELLA

MARTIN PALMER, CLOUD EXPERT

None disputes the benefits that cloud can bring to business. We've come a long way from the early days of scepticism and unease — especially in the more regulated industries like legal, financial services and insurance. Looking specifically at the legal industry, many of these advantages relate to productivity.

There is also overlap with other benefits, such as security, business continuity and cost savings, especially when you consider that most law firms are using a number of cloud solutions, from an on-premises server and apps in the public cloud, to private cloud and software-as-a-service deployment (such as Microsoft Office 365).

While there is complexity in managing this hybrid solution — ideally a task for both your in-house IT team and cloud provider — the benefits are immense.

In today's modern law firm, just as with most other businesses, there's a drive for more flexibility in the way that all staff work, from the managing partners, down to paralegals, secretaries and finance. What I see with the clients that I work with is that part of this is to address the much talked about work-life balance, while another part goes back to productivity. Increasingly, law professionals want to be able to work from anywhere: home, while travelling, client offices and remote offices. And how can you get this right? Through the use of cloud, in some form or another.

Taking operational systems from across the business — case management, finance, document management systems — and moving them to the cloud means your staff can access them at all times. More than that, as more staff are involved in cases, and the cases are spread around in the quest to increase billable hours, the flow of data and information is crucial. With systems in the cloud, all staff can access the relevant data, in real time, regardless of where they are.

Beyond that, it is doubtful that your internal IT team will be working round the clock to support your staff, because they generally keep office hours. However, when you use cloud, you'll most likely choose the solution based on its features and the way it will be supported, including SLAs around availability. What this means is, if a member of your staff has a problem accessing systems on a Saturday evening for example, it will be resolved. Not on Monday morning — as it happens.

In addition, these productivity gains, realised as a result of cloud, can be helpful not just in managing current caseloads, but also in winning new business — as a way to prove to potential clients that your firm is effective not just at expertise, but also at execution.

Of course, as I mentioned, productivity isn't the only benefit of cloud. Yes, flexibility, productivity and efficiency fall under the same umbrella — but more than that, if used optimally and if your solutions are fit for purpose, the benefits can be far more wide-reaching, whether using a private, public, hybrid, SaaS or on-premises solution. **LPM**

“While there is complexity in managing this hybrid solution — ideally a task for both your in-house IT team and cloud provider — the benefits are immense.”



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GOT TALENT?

LPM's HR agony aunt, Polly Jeanneret, explores some fresh ideas for finding and keeping the best people in your business

When I asked an experienced HR expert what he thought is the best way to attract and retain good people in a business, he said: "To be honest, just pay them well, treat them nicely." There's logic in his simplicity, of course – but those are just starting points. It is up to law firm managers to build on those fundamentals. In a people-based business like law, talent is the Holy Grail and firms are working hard to recruit and retain that talent.

SME law firms are having to be particularly savvy for two reasons. First, they can't just throw money and other scarce resources at the problem (for instance, they can't compete with 'money law'-style wages); second, they actually need more talent because business growth appears to be the order of the day. As one managing partner astutely commented: "If you don't grow, you go backwards." Thankfully, there are lots of good ideas out there: some involve new programmes and innovations, others require more of a deep rethink, and more structural change to the way a firm is run.

SEEK AND YE SHALL FIND

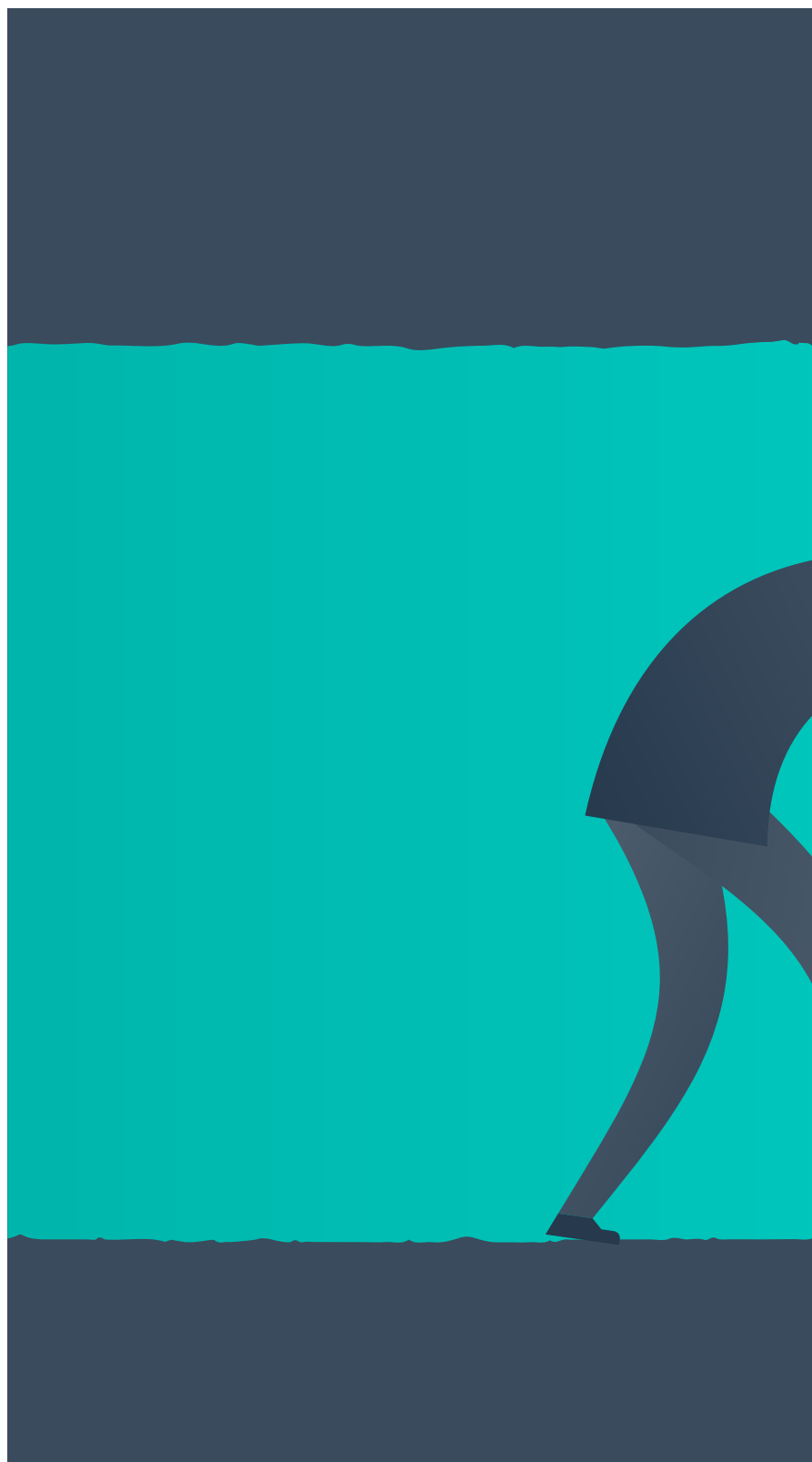
The most important mantra of recruiting for SME law firms is, counter-intuitively, not so much to know what you are looking for but to know what it is that you are offering. Firms that are successful at recruitment are open-minded in terms of their candidate profiles but very clear about what the firm is about.

Kemp Little is a boutique tech and digital media law firm based in London. Emma Wright, commercial technology partner, with responsibility for team and firm partner recruitment, explains how she believes you find the right people for your business: "We send out a strong message about who we are – you can't be all things to all people and you can't sell something you

aren't." The firm is developing a strong story for its website about what the firm is about, its proposition as a tech-orientated firm: "We are at the cutting edge of law; we are not a typical law firm. Candidates will either be put off by it or encouraged by it."

As a tech-based business, Kemp Little perhaps has an advantage over a full-service firm because it has a particular niche and so candidates who are not interested in tech won't apply there (you would hope, at least!). But full-service firms can and are making themselves distinctive to prospective recruits in other ways.

Thursfields is a long-established firm with a number



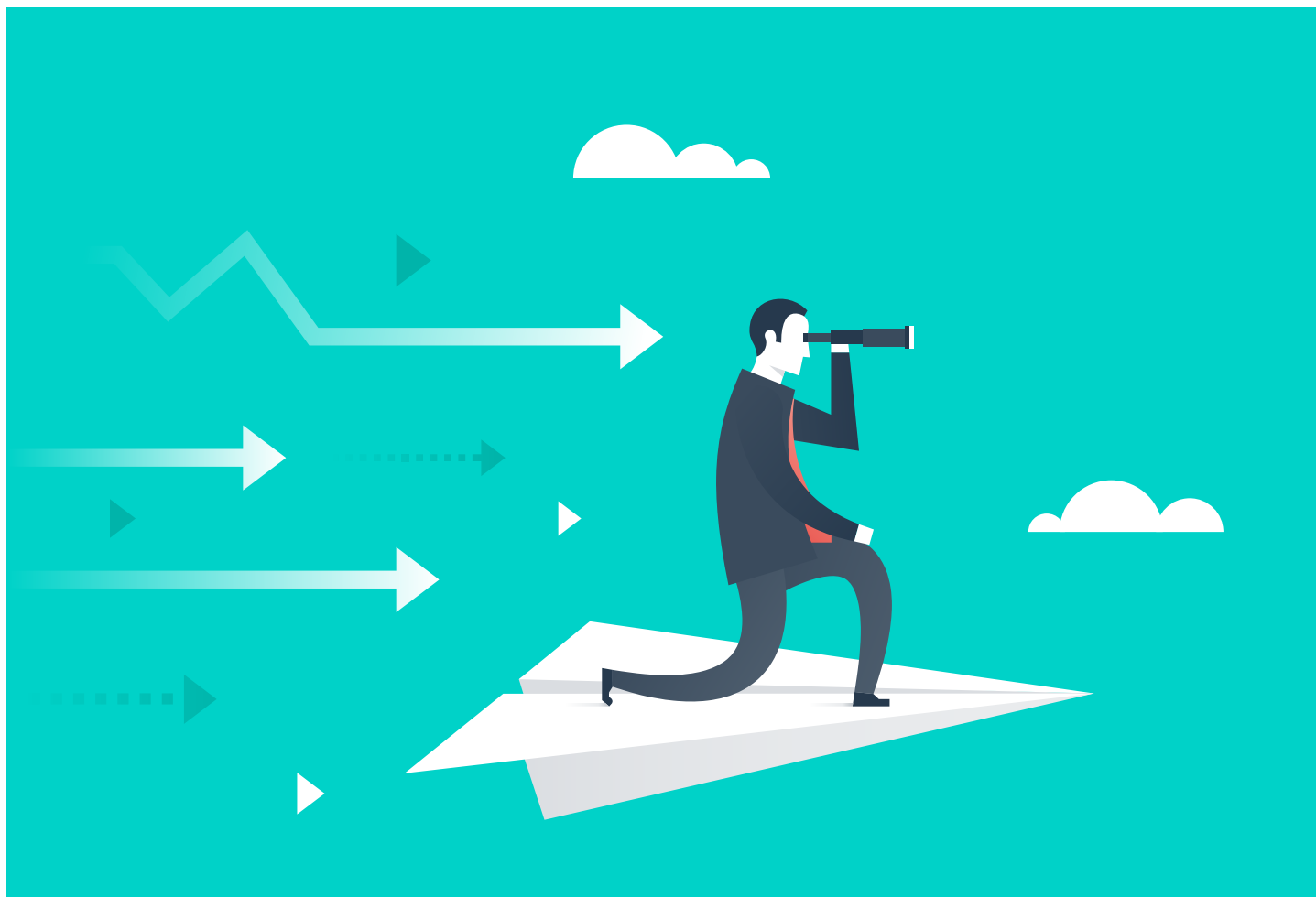


of outlets in the West Midlands. It is expanding and so recruitment is a key issue right now. The firm has introduced a theme of 'autonomy with accountability' whereby it has tried to move away from traditional hierarchies in the firm to instil the idea that each member of staff has individual control over their work (the autonomy bit) – but with that comes the responsibility to deliver (the accountability bit).

Michelle O'Hara is the commercial/HR director at Thursfields. She explains: "We think the partner model leaves lawyers disengaged. We see this as about ownership – if you own it you are much more inclined to go with it through to the end. If we give you that

“ *We think the partner model leaves lawyers disengaged. We see this as about ownership – if you own it you are much more inclined to go with it through to the end.* **”**

Michelle O'Hara, commercial and HR director, Thursfields



freedom, you must be able to deliver a return on our investment. Lots of people have good ideas but not many people can finish them.”

From a recruitment point of view, this facet of the firm is an attractive one: “Candidates usually feel frustrated and stifled in their current roles, they want more control over their working day,” says O’Hara, “particularly in larger firms, which our lawyers often come from. But we can give them that control.” Confidence in its own message allows the firm to be clear about its expectations. “We are very transparent about our business, about what we want to achieve. It is important to be honest about who you are and what you offer, otherwise everyone is going to be disappointed.”

OPEN TO ALL

If the idea is to be clear about the firm’s identity, the opposite is the case with a candidate. As Wright puts it: “We are trying to get a certain person, but we don’t think that person looks a certain way, or is a particular gender, or anything else.”

Across the board, firms are recognising the benefits of a broad and diverse workforce so recruitment processes have to be designed to enable that. For instance, firms can harness contextual recruitment or ‘blind’ recruitment – either method makes it much harder to choose candidates (even if unconsciously) based on them having a certain background or profile. Clifford Chance made headlines when it introduced such a policy a couple of years ago, and many larger firms have taken the same path. SME law firms are following this trend: Kemp Little, for instance, reviews CVs without the name, gender, school and university details. Even the Law Society now has an excellent toolkit on how to carry out fair recruitment with good

case studies and examples.

If these firms make the hunt for talent sound easy – it isn’t. Sintons, based in Newcastle Upon Tyne, is a single-office full-service firm, which has a growth strategy to reach £20m turnover by 2022 (it is currently at £14m). The firm estimates that it needs 10 new lawyers every year to make that happen. So far they have done well, recruiting 13 lawyers in the past five months across various areas and sectors. There have been specific challenges along the way, such as coming across skills gaps in certain practice areas (for example, corporate). Recruitment was based on three key messages, explains Mark Quigley, managing partner at Sintons: “We made sure the package was right, and we focused on the quality of our work and the quality of our working environment.” But he adds: “This doesn’t just happen. You have to make it happen. It was a concerted drive.”

FINDERS KEEPERS

Now that we know how much hard work recruitment

“We are very transparent about our business, about what we want to achieve. It is important to be honest about who you are and what you offer, otherwise everyone is going to be disappointed.”

Michelle O’Hara, commercial and HR director, Thursfields



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**LPM FIRM FACTS****Anthony Collins Solicitors****Revenue: Undisclosed****Corporate status: LLP****155 fee earners, 284 total staff****Offices: Birmingham****LPM FIRM FACTS****Sintons****Revenue: £14m****Corporate status: LLP****Offices: Newcastle****LPM FIRM FACTS****Kemp Little****Revenue: £14****Corporate status: LLP****71 fee earners, 99 total staff****Offices: London****LPM FIRM FACTS****Stephens Scown****Revenue: £21m****Corporate status: LLP****Offices: Exeter, Truro, St Austell****LPM FIRM FACTS****Ramsdens****Revenue: Undisclosed****Corporate status: LLP****270 total staff****Offices: 13 across Yorkshire****LPM FIRM FACTS****Thursfields****Revenue: £7.5m****Corporate status: Ltd****71 fee earners, 147 total staff****Offices: Birmingham, Kidderminster, Worcester, Stourport, Halesowen, Sedley, Solihull**

is, retaining employees seems all the more important - to make all the blood, sweat and tears worth it. Employee retention is firm-specific: SME law firms have to get to grips with what problems they specifically face before finding some solutions. Retention may be about training or mentoring, about changing the firm's culture, improving communication, revamping pay and benefits, putting in place aspirational career paths, flexible working, building trust, or fostering engagement.

Stephens Scown, a firm based in the south-west, has for the past four years featured in the Sunday Times top 100 best companies to work for. So what's its secret? What makes it successful in employee retention? In 2016, the firm adopted a John Lewis-style shared-ownership model, which means that all staff share in the profits of the firm. The structure works a bit like a bonus (and is based on the profits in any given year) but, importantly, it recognises all staff equally (apart from equity partners).

Its HR director, Lucy Palmer, explains: "Everyone receives the same payment irrespective of what level they are. A traditional bonus is selective. We want to acknowledge that everyone contributes the same, fee earners and non-fee earners alike." She concludes: "We have only had it in place for a couple of years but it is a very good attraction and retention tool."

The problem, however, with rewarding everyone the same is that not everyone always works as hard as everyone else, and it is possible for some staff not to pull their weight and yet still reap the benefits of the system. Palmer agrees that the model must be supported by a wider employee-engagement

programme, which aims to prevent this problem: "We have built a 'firm-first' ethos: if we all work together as a team, then the more we put in, the more we get out."

The engagement includes a number of initiatives, including office "viewpoint groups" run by employees to come up with ideas to make the firm a better place to work (past ideas have included a ping pong table, appraisal training and time off to give blood), and a set of programmes designed to instil a sense of fun - which sounds, er, fun!

THE LEARNING JOURNEY

At Thursfields, the firm has tackled the retention problem in two ways: by examining what it sees as its core values, and building incentives and learning and development programmes to support those values. O'Hara explains: "We rely on our values to really encourage everyone in the business to express an entrepreneurial spirit, to have ideas and to have the freedom to run with those ideas. This is embedded in our career progression scheme. If someone wants to progress, potentially to partner, one metric for us is that the person behaves like a business owner even if they are not one. This means taking responsibility for everything, from switching off the lights to taking part in a pitch."

But this does not just happen, staff need to have those values instilled in them. Thursfields does this through learning and development (plus, L&D is a good way to demonstrate that you are investing in your people). Part of it is the "agility" programme (designed by O'Hara herself) which includes sessions

on self-awareness, about how staff conduct themselves in the workplace. O'Hara says that staff love it: "They say that it helped them in their family lives as well as in the workplace."

L&D programmes, and creative engagement initiatives, are good ideas whose benefits are likely to outweigh the costs. This is also true of flexible working which, if managed properly, isn't costly. Indeed, flexible working has become, as one partner commented "part of the modern employment model." Peter Hubbard is senior partner at Anthony Collins Solicitors based in Birmingham. The firm won the Lex 100 Work-life balance award in 2017/18 so clearly they are getting something right.

Hubbard says: "Work-life balance means different things for different people, so we try and be flexible. We want people to invest in their career, to engage with a wider social purpose (which is what our firm is all about) whilst recognising they are still people with busy lives. We trust our staff and we treat them like adults. They are not required to clock in and clock out, they do not have to say where they are."

What is common to any tools of employee retention is a recognition that staff are individuals, real people with idiosyncrasies. You have to work hard to bring them together as a firm, to teach them what your

culture means. But that needs to be balanced with an understanding that they are their own people.

Claire Richardson is the HR manager at Ramsdens, a Yorkshire firm, which has completed no less than eight successful mergers and acquisitions in the past two decades. Richardson says: "We do try and give people what they are looking for but we do this by treating them as individuals. It might be that they are interested in flexible working, or that they are more interested in pay or career progression. These are priorities which change over time so you have to keep an open mind, listen to them and keep listening to them."

IT'S BEEN A HARD DAY'S NIGHT

Palmer said to me that it has taken Stephens Scown five years to build their engagement strategy – doing things well is hard work. "There is no overnight fix. It's a long journey," she says, adding: "And it never really ends because keeping staff engaged is a battle in itself." Take heart though from Richardson, who is more phlegmatic about retention: "We will lose people along the way, there's nothing much you can do about that." And, of course, you can always just rely on those fundamentals – pay them well, treat them nicely. Let me know how you get on. **LPM**

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Kill the bill



Nick Lakhani, finance director at asb law, talks about killing the billable hour and how the market has changed with NewLaw ways of working

As a law firm, we've spent many hours researching the legal market by talking to the people who matter: the buyers of legal services. Clients are telling us that one of their biggest frustrations with law firms is the lack of transparency and certainty when it comes to fees and, in my view, the billable hour is the primary reason for this frustration.

This may have suited law firms to date but it puts our interests in conflict with those of the client. The longer a legal problem exists (hours), and the more resource is thrown at it (people), the more revenue and profit is secured and the higher the cost to the client.

This obvious misalignment of interests helps to explain the almost universal feelings of frustration that clients have toward their lawyers – lack of transparency, lack of certainty on fees, the hourly rate, resulting inefficiencies and a lack of understanding of clients' needs. Why should a law firm be worried about the client's need and efficiency when they're remunerated on the length of time they spend on a transaction?

At asb law our vision is to be the 'the law firm that clients would design' and I can assure you that if clients were to set up a law firm from scratch, they would not be charging by the hour!

The reason for the reluctance of firms to move away from the billable hour can be attributed to the metrics used by traditional law firms – what I refer to as 'old law'. The drivers of profitability for old law are as follows:

- **Realisation** – The value of work in progress (WIP) billed to clients
- **Utilisation** – The amount of chargeable hours recorded and allocated to clients/matters
- **Leverage** – The ratio of partners to non-partner legal professionals
- **Expenses** – The cost of delivery.

The problem with this 'rule' approach of old law is that all of these metrics are geared around the inputs of a law firm and have nothing to do with what the client is interested in. Clients care about outcomes and results, and not law firm inputs.

THE MOVE TO NEW LAW

Although most law firms talk about client service, their metrics completely contradict this. So, following a strategic review, we decided to rip up the traditional law firm model and organise our firm with the client at the centre of everything we do. This involved creating sales teams whose sole purpose would be to design propositions around what clients want rather than what law firms sell.

Second, we set up service delivery teams whose purpose is to deliver on the promises made to the client and perform the legal services required by the client in accordance with the scope of work agreed.

Third, we changed our remuneration model so that bonuses were aligned to client satisfaction and not fees billed or chargeable hours.

Finally, we worked on producing one operating model for the firm with the objective of standardising all processes to ensure consistency in all parts of the business.

This was the start of our journey to a different type of law firm – or New Law.

We are about two years into the transformation programme and are very pleased with the progress that has been made. 2016/17 was the firm's best ever year and the bonus paid out to staff was the highest in the firm's history.

Having said that, we were still seeing some examples of reverting to 'old law' and also, in a few cases, our sales and service delivery teams were not collaborating as well as they could and should have. As a management team, we suspected one final change was required before we could really move forward to New Law and achieve our strategic objectives – but we could not impose our assumptions. We wanted the change to be driven by our people.

We arranged a meeting of key people from our sales and service delivery teams and had a frank conversation about why they were not always focused on client outcomes. In what we now recognise as a groundbreaking moment, we all agreed that we had to make one final change – kill



the billable hour and dispense with departmental profit centres. We agreed that our financial reporting will no longer be based on the sales price of time. We will no longer offer hourly rates as a pricing option to the client, although we anticipate that some clients will insist on shadow billing information for some time. The price agreed with the client will be based around outcomes and value from the client's perspective.

As far as I am aware there are only a small minority of firms doing this, but from the start of the new financial year we will no longer be capturing fee-earner time at standard hourly rates.

The new business model of our firm will be focused on client outcomes and aligned to our core values, which are transparency, certainty, innovation and collaboration. And what made the decision more compelling was that everyone in

the room came to the conclusion together – it was the only logical next step to take.

Our sales and service delivery team will collaborate and work in the best interests of the client, rather than worrying about how much WIP is available to bill. We have already experimented with this model and the feedback from our legal professionals is that they have felt liberated as they are only worried about one thing: the outcome to the client, as opposed to 'watching the clock' monitoring WIP levels.

Being involved in the transformation of asb law has been a fascinating experience, but killing off the billable hour for good is, I believe, the final piece of the jigsaw – where we will finally free up our staff to focus solely on delivering value and great service to clients. I am sure that the best is yet to come; watch this space! **LPM**

FIRM FACTS

asb law

Revenue: £11m

Corporate status: LLP

**76 fee earners,
150 total staff**

Offices: Crawley, Maidstone



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A portrait of Scott Brown, a man with short brown hair and a light beard, wearing a grey suit jacket, white shirt, and maroon tie. He is smiling slightly and looking towards the camera. The background is a blurred outdoor setting with buildings and trees.

TAG, YOU'RE IT

Scott Brown, digital services manager at Accesspoint, explains how SME law firms should be using search engine optimisation (SEO) to boost their brand, online presence and win clients

Search engine optimisation (SEO) is an integral part of any business's online presence – and an important component of the success of a business overall.

At times, SEO seems to carry a certain “fear factor,” says Scott Brown, digital services manager at Accesspoint. “This is mainly due to a lack of understanding around its ever-evolving nature, which leaves people a bit uneasy. Firms need to know how it works, the time it takes to get it right, but also the benefits they can reap.”

Simply put, the purpose of SEO for a firm is to connect with people searching for services and then to turn them into customers. When done correctly, it's seen as an investment, not a cost, he adds.

He says: “Your website and SEO strategy are working for you 24/7. It's a bit like a perfect employee who never calls in sick, is never late for

work and continuously delivers leads like clockwork.”

MYTH-BUSTING SEO

SEO is not a magic formula, Brown says, and the old days where sites could be populated with metatags, with just a few sentences about your services, some keywords, and off you go, are over.

“It should be seen as a sort of art, which is beautiful when you get it right. It does involve a lot of market research behind the scenes. And it should be said that it often doesn't yield instant results but gradually starts to deliver over time – a lot of business leaders have a hard time grasping its importance as a result.”

He says that building up SEO works in just the same way as building up a reputation. Firms need to grow their online presence and demonstrate cohesive thinking in their marketing strategy and

use of SEO.

In order to get to that point, real effort should be made to arrange regular get-togethers for “bouncing around ideas,” he adds.

“Nothing should be last minute. It would be great to get a calendar together and come up with a plan of action, gather ideas for topics to be covered on the website and any areas of improvement.

“There’s always room for even the smallest of firms to gain opportunities online and increase their presence. An increase in high-quality web traffic can ultimately lead to new clients – and could create a ‘David and Goliath’ scenario out of the SME firms and their larger competitors.”

DO IT RIGHT

It’s hard to measure the success of any strategy if the goals are vague; the same is especially true for an SEO strategy.

Firms should break their SEO strategy into specific, measurable goals such as getting X-many visitors to the site, Y-many leads from these visits and Z-many conversions to cases as a result, says Brown. “It helps us as SEO experts to measure, analyse and adapt based on changes in traffic and conversion rates.”

SME firms particularly need to think outside of the box in regard with choosing keywords. He says that simple words such as ‘family law’, ‘conveyancing’ or ‘probate’ won’t cut the mustard online.

Brown says: “Instead, they need to use long-tailed keywords which are more in tune with what people are searching for. Google is actually taking into account the phrases and terminology that people use to search. It is very important for SME law firms to monitor this behaviour.

“In the legal world, we use terms such as ‘dispute resolution’, whereas the client would be unlikely to search for this. It’s very easy in this market to lose track of how your clients actually speak.”

He adds that Accesspoint has tools that can help firms find the keywords that are applicable to the topics clients search for – which is why having an SEO expert who understands the legal industry can create big opportunities online.

A key thing to understand about law firm websites, Brown says, is that requirements can be split into two categories: distress purchases, which are urgent services such as immigration or abuse cases, and planned purchases, which are things like conveyancing or drafting wills and take more

time to think through.

“Firms can use this knowledge to work on two areas of improvement: local SEO and onsite SEO. Local SEO is extremely important. Google now heavily relies on GPS locations to find appropriate services closer to the individual. And now over half of searches are done on mobile devices, so local information needs to be ready and waiting for your clients from the moment they look for it.”

But with GPS being used to direct traffic online, even if clients are just searching for numbers and directions, SEO needs to be precise so as not to lose interest.

And this is supported by the back end of your website, with onsite SEO, he says. “We still see a lot of pretty stale websites in the SME legal market – especially content that isn’t mobile-friendly.”

DIGITAL FUTURE

“Even the smallest of things can swing a person’s decision away from leaving your website and convert them into a client. So, you need to engage with your audience across several platforms to increase your brand exposure and traffic to your site.

“For the legal industry, we often find a four-step marketing plan is successful,” he says.

- **Awareness** – you must create awareness of your brand via your online and offline advertising, campaigns and lead generation.
- **Engagement** – engage with your clients and those who interact with your business.
- **Decision-making** – create elements that make it easy for people to convert into clients.
- **Retention** – keep these clients with good management and encourage them to leave positive reviews on websites such as Google or Facebook. This will feed back into the first step – awareness.

Brown says SEO and the way Google reads information on the internet has evolved and will continue to change rapidly. Modifications to search engine algorithms will actually give firms of all sizes a chance to supply high-quality content to users in many areas. And, in turn, interest in quality web content will grow in importance.

“Therefore, Google will continue to punish all websites with excessive links, keyword stuffing and poor web-building techniques harshly. Previous, poorer SEO techniques will also be cleansed,” he says.

Though the internet may be vast and the SME legal landscape perhaps even more so, firms can learn to strengthen their SEO strategy and market where it counts. **LPM**

ABOUT THE SPONSOR

Accesspoint is an independent legal IT specialist that consults on a variety of information technology-related issues, offering the best in IT solutions to help firms work more effectively.

www.theaccesspoint.co.uk



CASE CLOSED

Joshua Lenon, lawyer-in-residence at Clio, says a good case management system improves efficiency across the firm and allows fee earners to leverage data and keep good data hygiene

There are two real advantages that most law firms are discovering when they use case management, says Joshua Lenon, lawyer-in-residence at Clio – the first is centralisation of information and the second is efficiency gained because of that centralisation.

With the advent of the case management system (CMS), which was for a long time really only available to the magic circle firms, he says the market eventually started to see lawyers adopting it at scale and finding they were saving hours a month on administrative tasks.

“Clio, and other cloud-based platforms, enable lawyers to work not just from their office on a CMS but also from home, on their mobile or tablet, wherever they are.

“As the CMS evolved into the cloud space, we saw those efficiency gains really spike and now lawyers are saving hours a day on administrative tasks. They’re able to use that time on what’s important to them.”

Lenon says the possibilities are endless – that time gained could be spent on obtaining more business for the firm, investing more time developing their skills as a solicitor or even spending more time with the family.

ALL ABOUT THAT DATA

In order to take full advantage of a CMS, or any technology for that matter, firms need to have good data hygiene – data entry is the first step.

One thing to consider is does the vendor accept common formats for data – for example, Outlook is incredibly popular among lawyers, he says, so making sure that the CMS actually accepts contact information in that format will rapidly increase the speed of migration and data hygiene.

Data extraction is the other side of that coin. He says: “This will be incredibly important based on rules or record retention as well as just keeping your business running smoothly. Never put your data into a tool that you don’t know how to get it out, and a good CMS will walk through both migrations – into and out of the system.”

But the fun shouldn’t stop there, Lenon says. A good CMS will also allow firms to use data in multiple locations.

“Document automation is a good example of how firms can take data leveraging to a whole new level. Rather than working with simple mail merge functions, we can now work with templates in the CMS, which allow fields to be populated with client information automatically, where needed.

“You can track a much wider range of information than you could if you were still spreadsheet-bound.”

For instance, data from a conveyance can be leveraged to a much greater extent and can even be integrated with highly-specialist tools. Clio has a plug-in tool called Klyant, which will take all of the information imported from Outlook, or entered manually, and turn it into a conveyancing package automatically.

He adds: “This capability is just not possible if your information is siloed into different tools – such as across Word, Excel and Outlook.”

And this good data hygiene and ability to leverage data automatically will mean better knowledge management across the firm, he says. Again, this creates efficiencies where time can be allocated to added value.

MAKING CHOICES

There’s nothing worse than purchasing software and then never using it, Lenon says, it’s a waste for staff and bad for business. “When deciding on a solution, don’t just look at the features but the whole interface. Make sure it can be customised to your workflow and that it’s something you want to take the time to know.”

A CMS shouldn’t impose any limits on the firm in terms of the number of cases, contacts or documents, because those are all highly variable and will increase at a successful law firm, he says.

Security is the obvious next point. Lenon says it’s very easy for third-parties to audit vendors, and vendors should be providing their security certificates so firms can see when they were last checked, how frequently and what types of



checks those are.

He says: "Once you're happy with the system, its capabilities and security, it comes down to the type of law you practice. If you're handling high-volume, how easy is data entry? Can you shift that workload onto your clients themselves and can they enter information securely? Taking this time off your hands allows you to focus on analysis.

"Accessibility is a huge issue – both for clients and lawyers. Does your system consider people with vision difficulties, for example? Cloud is actually making their lives better because its standards adhere to the accessibility standards for people of all levels of ability."

FULL LEVERAGE

There's a hunger in the SME legal market for this type of software now because of the advantages of scale coming from cloud-based versions, Lenon says.

For a long time, fee earners used paper files, email that was run on a local server or information stored in an individual's laptop – they'd use Excel or some type of spreadsheet program for tracking their time and then they would generate bills by hand.

And that was pretty sufficient for many firms, he says, simply because of the difference in volume of work at that time and regulatory requirements weren't as onerous as they are now.

He says: "The regulatory and other environment changes are only accelerating right now. As the security needs of technology also rapidly advance, what we see is not just an appetite for centralisation and efficiency that come from a CMS but also the peace of mind that comes with a good provider. You need that trust."

It's vital now, more than ever, that firms know exactly where their data lies. "If you don't know where information is, how it's organised and used, then you can't actually make a sound judgement about your data and what steps you need to take as a legal professional or business person – and that can hurt your reputation and lose you clients," Lenon warns.

For a successful modern law firm, efficiency is key. SME law firms should take advantage of drivers in the market, whether that's GDPR, Brexit or other, and explore how a CMS can improve data hygiene and therefore legal service delivery. **LPM**

ABOUT THE SPONSOR

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

www.clio.com/uk





GDPR AFTERMATH



Matt Torrens, managing director at legal IT experts Sprout IT, explores 'what's next' for businesses in the legal industry after GDPR enforcement date on 25 May 2018

Nearly 10 years after it was first discussed at the European Union, the General Data Protection Regulations (GDPR) are now law across 28 EU countries. To say that its introduction has been smooth would be a generous assessment. Up until the final few weeks, the Information Commissioner (ICO) was yet to publish guidance on some major aspects of GDPR and busily revising other advice they had previously pronounced on.

So, 25 May 2018 has come and gone and the sky has not fallen in; can we say that everything's OK now and that we can get back to business? The answer is no – the likelihood is that we're in the eye of a storm that will dominate not only the legal sector over years to come but other industries which rely on recording and processing personal data.

LATE TO THE PARTY?

A few months ago, it's fair to argue that there was a certain amount of complacency within legal firms about GDPR. Writing in November 2017 in Computer Weekly, security editor Warwick Ashford wrote: "most law firms in the UK do not yet comply with the EU's General Data Protection Regulation (GDPR) ... According to a report by managed services provider CenturyLink EMEA, only 25% of more than 150 legal sector IT decision makers said their firms were GDPR-ready, despite the threat of fines of up to €20m or 4% of annual global turnover for serious data protection failings under the GDPR."

The more worrying aspect of Warwick Ashford's report is that the quarter of firms whose IT decision-makers reported that they were prepared

were just giving their own opinion. This was not the opinion of an outside auditor with specific and deployable experience in readiness for, and compliance with, GDPR.

Things have changed since the time this article was published. There appears to have been an industry-wide concerted effort to get ready for GDPR at both board level and within individual firms' IT teams. This drive has led to the publication and distribution within legal sector firms of many new policies, procedures, and best practice guidelines.

PEOPLE POWER

But have your staff been adequately trained on these new policies, procedures, and best practices? Do they even understand them, considering the length of time it has taken for the ICO to provide guidance that can be relied upon? Will staff adhere to new policies, procedures, and best practices when they're processing personal information? And do they know what they need to do to protect that personal information?

The answer – and this answer is not just confined to the legal sector – is probably no.

Individuals now have greater data subject rights than ever. Privacy advocates will argue that there are many benefits to these changes in that we can now feel safer sharing our information with organisations as the rules surrounding how that information is handled are a lot stricter than before.

However, it is this strictness that will cause companies the biggest headaches as they adapt not only their IT systems but the way their staff comply with these new rules.

Despite the best intentions and the fitness for purpose of new policies, procedures, and best practice guidelines, your staff present the biggest threat to your business under GDPR through their lack of knowledge and ongoing training.

TRAINING GAINS

Staff need to understand the regulations and their practical application both to your firm and their responsibilities. It will be your staff who manage and use personal information, so they must understand the processes and policies governing them and the reasons behind those processes and policies.

This will take time, patience, and ongoing training. Introducing and nurturing a culture among frontline staff compatible to GDPR compliance will mean that, through periodic testing and in reaction to real-life lapses, you can identify on an employee-by-employee basis whose knowledge is lacking and provide them with support.

Ongoing training will also be required to provide those who manage your staff with full knowledge of how the regulations apply

“It will be your staff who will manage and use personal information, so they must understand the processes and policies governing them and the reasons behind those processes and policies.”

to the responsibilities of their team or the department they are in charge of. GDPR brings tough new reporting requirements on data breaches and it's critical that a manager recognises a potential breach because, even with training, a staff member may not.

IMPACT READY

GDPR requires organisations to complete a data protection impact assessment (DPIA) before carrying out any processing likely to result in a higher-than-normal risk to individuals' interests. Many advisors argue that companies should perform DPIAs before any change in how data is processed as a demonstration of best practice.

Once a DPIA has been performed, the results should be shared with both frontline staff and their managers so that there is a wider awareness of those employees' specific data processing responsibilities in an organisation.

Article 30 of GDPR requires your organisation to keep records of how it processes personal data. This should remain an ongoing exercise so that those responsible for compliance in your business understand what data is held, why it is held, and if those reasons are compliant.

Auditing is another important consideration in the GDPR era. Many recommend that an annual audit program is instituted across an organisation and its individual departments to ensure continued compliance with particular reference to how data is processed and its potential impact on the subject whose data you're holding.

Your practice has been through the preparation stage – that was hard enough. Even harder will be ongoing implementation and compliance with a sometimes frustratingly complex set of regulations. And it will be these regulations which will make or break some firms in the legal sector.

For companies with 250 staff or more, outsourcing a data protection officer (DPO) until a full-time staff replacement is recruited is their likely course of action. For smaller firms, they will likely choose an outsourced DPO on a permanent basis to prevent future disaster. Either way, the world changed on 25 May and you'll need to adapt to the new reality. **LPM**

ABOUT THE SPONSOR

Legal IT specialists Sprout IT provide high-quality IT support, cloud and consultancy for the legal industry. Sprout's data protection officer-as-a-service offers GDPR compliance support for legal business. www.sproutit.co.uk

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MODERN PRODUCTIVE



Ravi Lal, senior product manager at iManage, discusses the legal market today and how SME firms can learn to leverage technology for their advantage

Today's modern professionals demand easy-to-use, productivity enhancing tools that support new ways of working, the way they want to work. They require tools that empower them to create, manage and collaborate on all work product from anywhere, on any device, in a single user experience, turning lost time into productive time. This is a common thread throughout law offices of all sizes, but it's especially vital for small to mid-sized firms with limited staff and stretched resources.

HIGH-DEMAND SMART FEATURES

Average, run-of-the-mill features are no longer sufficient for today's savvy professionals. They want smart features that eliminate traditional friction points in common tasks and increase productivity, allowing them to work the way they want to work.

Productivity enhancing features help today's users cut through the clutter and make better decisions more effectively by leveraging AI, machine learning and big data analytics to eliminate traditional friction points in common tasks and anticipate needs based on historical data. Email filing keeps them ahead of inbox overload and more responsive to pressing client needs.

Today's tech-savvy legal professionals are looking for a modern user experience. These professionals want flexibility as they are no longer bound by the confines of their offices. Simplifying daily workflows from document searches and email management to remote work takes the burden off the users – reducing the learning curve and increasing user adoption.

Cloud-based solutions offer benefits from continuous upgrades, extensive scalability and sustainable performance from anywhere. By moving to the cloud or starting from scratch in the cloud, users have access to all their important documents, emails and other files no matter where they are or what device they're using. This makes it easy to

ensure optimal efficiency, key for smaller or mid-sized firms that operate in a nimble fashion.

Document timeline, dashboard and analytic tools with a consistent experience across phones, tablets and desktops help today's modern users make decisions faster and with more confidence as content is managed by engagement so users are never more than a few clicks away from what they want to see. Users are turning more and more to technical advancements to meet these needs and to give their firms a competitive edge with new levels of decision-making tools and enhanced quality of client service.

Busy legal professionals at small to mid-sized firms are looking for personalised search features to quickly cut through the clutter and locate relevant information in less time. Searches should be automatically tuned to work style to easily find all work product, eliminating complex search forms and keywords, as personalised search is really all about getting the results most relevant to the user, helping them filter out the noise quickly and efficiently.

A mobile-first user experience ensures users can learn the software once and have a consistent experience across any device – phones, tablets and desktops – to stay productive on-the-go by turning idle time into effective worktime. The entire electronic project file can be easily accessed regardless of platform, location or bandwidth.

Seamless integration with the applications on-the-go professionals are already using makes emails that are typically isolated in individual inboxes part of the shared and governed engagement file, as busy attorneys don't have time to dig through a complicated file structure to find what they need – they want it easily accessible at their fingertips. And it saves duplicative efforts, as the filed emails are automatically flagged for all relevant users – no need to cross-check or clarify with colleagues.

When collaborating with stakeholders, modern professionals demand accountability, so they can



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iManage uses artificial intelligence and market leading document and email management to transform legal businesses.

www.imanage.com



manage client interactions more effectively. Being able to easily share, restrict and track all interactions while ensuring the content is governed securely end-to-end allows firms to provide clients with unparalleled peace of mind.

NO IT DEPARTMENT, NO PROBLEM

Of all the newest smart features available to firms today, one of the most important for consideration may be the option to deploy a solution via the cloud. With a leaner team in place and limited IT resources, many smaller or mid-sized firms can benefit from a cloud-based solution as this will provide an easy mobile-first user experience that allows on-the-go professionals to easily search, find and manage critical work product from the courthouse, client

meetings or remote office – anywhere, at any time, on any device.

It's so incredibly easy to use that users easily adopt it for their daily workflow – IT departments are not required, because are, let's be honest, who has time to sit through hours of training. The end game, ultimately, is to better serve clients.

Small to mid-sized firms around the globe are embracing new cutting-edge solutions that offer smart features, such as iManage Work 10 and iManage Cloud, to ultimately enable them to better service their clients, which is the end game for legal professionals – that's what distinguishes one firm from the other. It's really all about finding the most advanced solutions to enhance attorney productivity and enable them to find essential work product more quickly than ever. **LPM**

CLEARING UP CLOUD

Nigel Wright, CEO at Converge Technology Specialists, discusses how engaging with a cloud partner can help firms create a robust cloud-first strategy and stay on top of competition in the market

Smarter 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.

Nigel Wright, CEO at Converge Technology Specialists, says: "The SME legal market is coming to terms with the changing landscapes – and many forward-thinking firms now understand why they need to adapt to the future of 'modern' law."

Managing IT, data and digital processes effectively will be a big factor in determining the firms which succeed and those that fall behind in the next few years, he adds.

"The challenge firms are currently experiencing is how. There are myriad options associated with driving success, but an equal number of threats. With the right planning and guidance firms can develop a cloud-first strategy that future-proofs their business and drives real bottom-line value.

CHANGE IN APPETITE

Cloud-first strategies are growing in the SME legal space – most accept that some, if not all, of their infrastructure and applications will move offsite over the next few years. The most common move for SMEs right now will be their practice management system (PMS) – a vital part of smooth-sailing business for a law firm. Many of these systems are close to end of life and firms are taking this opportunity to explore the option of purchasing a PMS hosted in the cloud.

Wright says: "Three years ago many of our cloud conversations with the market focused on security and data residency concerns. Now firms have already decided that they want to transition to the cloud but are working through how they do that."

“ *Get your planning right – work with an IT provider who has extensive legal sector experience. This will make building and initiating your cloud strategy all the more effective.* **”**

There are a lot of reasons for this shift, including mobility of staff, evolving skillsets required for newer technology, and cost savings, he says.

However, many firms will move their systems piecemeal to the cloud, and develop a 'hybrid' model. Many firms may retain a hybrid infrastructure while others will eventually move to a fully offsite cloud environment, driven by the fact that some legacy systems will take longer or be incompatible with an offsite move.

"We're also seeing that forward-thinking internal IT teams want to focus on value-added activities, rather than spend time and resource on keeping the lights on."

Because of this change to a more strategic focus by IT teams, more of firms' resources are being leveraged to drive fee-earner productivity across the board. In order to achieve that, Wright says, Converge TS engages with firms to provide consultancy advice, which guides their IT strategy.

"Whether you're going to move public, private or hybrid, we can work with internal IT teams to help design what that looks like, specific to the firm's individual needs."

Designing the right cloud strategy will be vital to a law firm's future. Another huge aspect going forward, of course, is security and mitigation of cyber threats – firms are trying to build in solutions today that will then continue to be



developed and utilised over a number of years.

He says: "Our security operations centre and associated services have been designed specifically with law firms in mind to help with the ongoing management of cyber threats."

Wright adds that though these aren't specifically related to the General Data Protection Regulation (GDPR), it's a step in the right direction. "If firms adopt best practice, it actually mitigates a lot of threats, helping them to become GDPR-compliant. Generally, having a security and cyber threat management service dovetails into their overall cloud-first strategy piece."

ENGAGE TO SUCCEED

Engagement is key to building a successful cloud strategy, he says. Now that the market is more comfortable with the idea of cloud, the next question is how to progress.

"Get your planning right – work with an IT provider who has extensive legal sector experience. This will make building and initiating your cloud strategy all the more effective."

One key challenge is overcoming difficulties associated with legacy hardware and software. There are investment lifecycles and associated return-on-investment expectations but there are ways to design a cloud-based strategy to work with those challenges, Wright says.

An early stage cloud assessment can be hugely beneficial. This would look at the whole span of the firm's infrastructure, software, systems and processes; it would define what is capable of moving, if there's a business need, examine expectations and create a timeline.

And, Wright says, a key output of the review should be a technology roadmap over a three to five-year timeframe.

"Clear planning is key before embarking on major projects in order to maximise speed of project delivery, application compatibility and alignment with the overall business strategy."

Forward-thinking SME law firms are stepping up their game and embracing the benefits of a cloud-first strategy as a key differentiator in an increasingly digital world. **LPM**

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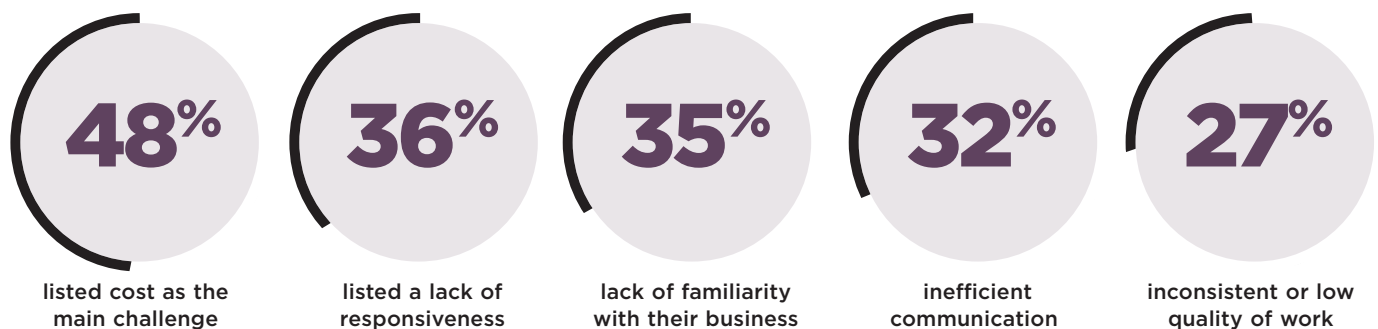
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BIG FISH TURNING SMALL GAME

Business leaders at large companies are frustrated with high legal fees and are turning to SMEs and specialised providers, a new survey reveals

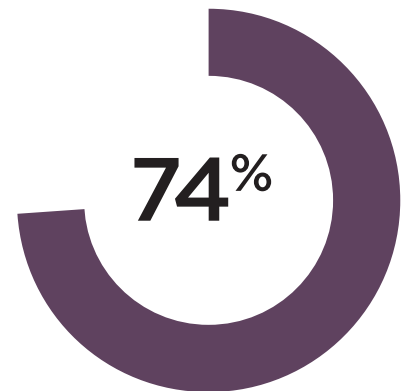
CHALLENGES FACED BY BIG BUSINESS WHEN IT COMES TO WORKING WITH OUTSIDE COUNSEL



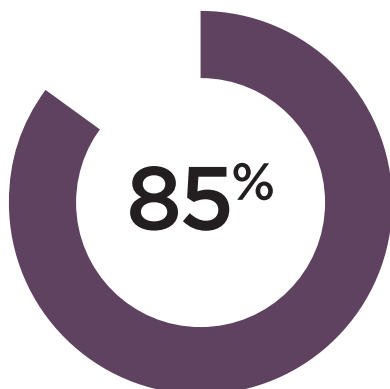
40% expect spending on smaller service providers to increase five years from now



74% of respondents believe SME service providers with fewer than 500 employees will have an important role in their firms five years from now



85% said service providers with specialised expertise will be more valuable to their firms than providers with a broad range of offerings five years from now



54% of respondents say a stronger value proposition is the reason they would choose to work with SME service providers instead of large law firms in the next year



Source: Economist Intelligence Unit survey of business leaders at companies with a turnover of more than \$1bn USD by Globality. Get the report: www.solutions.globality.com/eiu-legal-summary



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