

MAY 2017

# LPM

LEGAL PRACTICE MANAGEMENT

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## LAW FIRM PROFILE

*How MLP Law  
boosted business  
support to aid growth*

## BOOK REVIEW

*Stepien Lake's practice  
director delves into  
Robots in Law*

# Can PI survive?

*Will the government's  
personal injury reforms kill  
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# WELCOME

*The personal injury market may be facing it's latest round of challenges – and firm's specialising in road traffic accident claims may not survive*

Personal injury has had its fair share of near misses over the past decade. Just four years ago PI firms had to contend with the Jackson reforms – but proposals to raise the small claims limit and create a whiplash tariff might point to the end of the road for cost-bearing road traffic accident claims. Many LPM readers, I'm sure, will be relieved by the recent news that the Prisons and Courts Bill has been scrapped ahead of the general election. But the bill doesn't cover changes to the small claims limit and – should Theresa May secure the victory she thinks she will get – a returning Conservative government may well simply pick up on PI reforms where they left off. The election might be dominating debate right now, but the political appetite for PI reform hasn't dimmed. Read our feature on PI's uncertain future on p34.



But it's not all doom in the magazine this month – we've also looked into cloud IT adoption in SME law firms, with the help of Pulsant, in a pull-out supplement (p21). Cloud is becoming increasingly popular among SME law firms, we've found – making them more competitive and better prepared for disasters – including cyberattacks.

Speaking of cyber, be sure to read our interview with KPMG's cybersecurity director on how good security plans largely come down to better communication across the business (p7).

And finally – will I see you at our LPM conferences this year? Find the conference agenda on p9. It's always excellent and gives me a chance to meet the people that keep LPM going. If you haven't had a chance yet, book your place now: [www.lsn.co.uk/lpm2017](http://www.lsn.co.uk/lpm2017). It might also be a nice refuge from the bombardment of political propaganda we're all likely to have thrown at us over the next month ... [LPM](#)

Patrick Wingrove, assistant editor  
@LPMmag | [patrickw@lpmmag.co.uk](mailto:patrickw@lpmmag.co.uk)

*"The election might be dominating debate right now, but the political appetite for PI reform hasn't dimmed."*

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# About us

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

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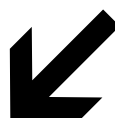
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# IN PRACTICE

*Edited by Patrick Wingrove*

## SNAPSHOT KILLING THE BILL

Just when we thought this year might be a little less surprising than last, the government dropped the bombshell that we will have an early general election in June – and it's already had a significant effect on the legal industry.

**Parliament scrapped the Prisons and Courts Bill** as MPs prepared for the election last month. The bill – which covers reforms to low-value personal injury cases as well as prisons and the courts – was set for the latest session in its committee stage, but didn't get there after it was decided not to proceed. It may be a temporary relief for PI firms, however, since a re-elected Conservative government could come back to the reforms at a later stage.

The government isn't the only entity to drop plans recently. **The Legal Services Board abandoned proposals to discover why women and people from black and minority ethnic backgrounds so long to reach senior roles in legal.** An LSB spokesperson said: "After considering the availability of resources, and noting the work already underway by other organisations, we do not propose to proceed with this work in 2017/18 but will take a keen interest in the findings produced by others."

Meanwhile, **digital signatures were used for the first time in a residential property exchange of contracts** in England, according to the Conveyancing Association. Newport firm Convey Law used an e-signature facility to sign the contract for both the sale and purchase element of the transaction. The firm's legal director Gareth Richards described the exchange as a "significant step in the right direction" for e-conveyancing.

Perhaps if firms continue to be innovative in this way they will keep growing at the same rate as last year. According to the Law Society's annual financial benchmarking survey, **fee income for medium firms has increased by 5.4% and net profit per equity**



**partner by 8.4%.** The survey also suggests that most work types have seen increases in fee income – although criminal law teams have experienced a significant reduction for the fourth year in a row.

If firms want to keep on this track, they need to make sure they're hiring the right people. They must make sure, however, that they check CVs. **Lee Hull, a former legal assistant at Shropshire firm Clarkes Legal, was fined £2,000 by the SRA over lies on his CV.** Hull said he'd graduated from the University of Leeds – as opposed to Leeds Metropolitan University – and that he had been called to the bar when he had only completed the bar vocational course.

Perhaps he might do well running in the general election? [LPM](#)

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

"Right, now the issue of the Prisons and Courts Bill has been settled let's get back to this election."

IN NUMBERS

### The young and stressed

A report from the Law Society reveals the impact of stress on young fee earners

26%

described stress levels as 'severe' or 'extreme'

53%

said stress lead them to nearly make crucial error

73%

said their firm could do more to support stress at work

Source: JLD resilience and wellbeing report, Law Society (April 2017)



**ED TURNER**  
MANAGING PARTNER,  
TAYLOR VINTERS

I think the question of deregulating unreserved work for law firms may be a red herring. Regulated status should be a foundation for the brands and personalities that we build. They are a minimum benchmark for how we deal with clients that can then be developed to reflect our specific market focus and identity. The unbundling of work, use of appropriate skills and the application of technology for reserved activity are all perfectly acceptable when subject to appropriate oversight in the regulated context. In my view regulation is only a perceived barrier to innovation, rather than a real one.



**PAUL BENNETT**  
PARTNER AND  
MANAGEMENT ADVISER,  
AARON AND PARTNERS

On balance it's a bad thing. The SRA's proposals are aimed at encouraging competition, but in reality they will make selecting an adviser more complex for consumers and business owners. As these proposals only affect unreserved work, they won't improve access to justice. Deregulation is not the answer, and innovation is actually stifled by constant SRA regime changes, PII costs, the bureaucratic Legal Ombudsman regime and existing competition from about 11,000 firms. Adding more complexity by deregulating unreserved work won't help – addressing professional indemnity issues, however, would help consumers and SME firms far more effectively.

# YOUR VIEW



*With the SRA planning to fundamentally change the legal sector's regulatory landscape, we ask LPM readers:*

*“Will deregulating unreserved work be a good or bad thing for SME firms, and why?”*



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**GORDON STARK**  
COO, MURGITROYD

The regulator will always look at ways to promote competition and increase access to legal services. Reducing the scope of regulation could be an effective way to do that – but it needs to be balanced against an overall loss in quality of advice. While clients could be provided with the prospect of lower costs and greater choice, they will likely continue to value relationships with advisers that they know, like and trust. So, continuing to place importance on relationship building while also delivering excellent value will help firms navigate any regulatory changes.



**ELAINE MOTION**  
CHAIR,  
BALFOUR AND MANSON

The fundamental aim of increasing access to solicitors and therefore access to justice is a laudable one and should be encouraged. But while deregulating unreserved work creates opportunities, it also creates risks. The change has the potential to damage client and consumer confidence, as well as create a backlash to the legal profession generally when a client seeks redress but finds there is no recourse available through the SRA. As always, the devil will be in the details required if unreserved matters are deregulated – and the law of unintended consequences may be very much alive in this matter.

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## ASK THE EXPERT



# PROACTIVE SECURITY

Tom Burton, cybersecurity director at KPMG and keynote speaker at this May's LPM London conference, on how firms should tackle cybersecurity



**Q** What kind of threat does cybercrime pose to small businesses?

**A** A very significant one. Four or five years ago cyberattack was largely a problem for big business. But cybercrime is both organised and rational – while small businesses may present a smaller 'prize' they're seen as a softer target. By far the most common attacks are known as CEO fraud (where an attacker uses social engineering tactics to pose as a senior manager and asks accounts to transfer money into a fraudulent account) and ransomware (software that encrypts a business's data and asks for a ransom to unencrypt it). These are targeted at any businesses that handle money or sensitive data, and SME law firms handle both.

**Q** Why do you think SME firms have cybercrime high on their agendas but only rate it as a medium threat,

according to this year's LPM Legal IT landscapes report?

**A** You rarely find anyone these days who says cybercrime isn't a problem – because of the media, awareness of cyberattack is extraordinarily high. But there's a significant gap between awareness and understanding in many organisations. It's one thing for a board to put cybercrime on the risk register but quite another for them to understand what that risk means to the business. The subject of info security comes across as quite 'geeky' in the media, so many managers just pass the task to their IT department and say: "Sort out our cybersecurity," and they think they're safe. But cybercrime poses a huge risk to their organisations and they need to be more proactive in their approach to it. Many of the most effective defences relate to changing staff behaviour rather than implementing technology.

**Q** How can firms take a more proactive approach to information security?

**A** Law firm managers should start by deciding which business risks are intolerable, and then assess what the business can do to mitigate them. It's about having a discussion across the business and looking at the risks in a business context. SME firms need to be asking: "Why would people be interested in attacking a law firm like ours?" It may be that criminals are attacking the firm as a means of getting to clients. If the clients are more secure, then the firm risks becoming an easier proxy to attack. It's essential that risks are prioritised so that resources are focused on those most likely to cause the greatest disruption or material damage to the business. Once that's been established, managers can give their IT departments a clear direction for info security. For example: "Make X information a

priority because if we lost access it could be a breach of confidentiality and/or put the health of business at risk." Managers then need to be prepared for the resulting cybersecurity measures to have an impact on the way business is conducted.

**Q** Could proactive cybersecurity help firms differentiate themselves?

**A** Firms trade on trust and the cliché that it takes years to build and minutes to lose is very true. But there's an opportunity for the firm to make its security a differentiator. If a firm is proactive in its security, it will be prepared for a client asking about it. They can have a prepared response that meets most of the questions asked, and will avoid being told what action to take by the client. This way, the firm can assure clients that it's taking data security seriously and build confidence in the market. **LPM**

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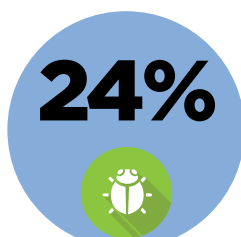
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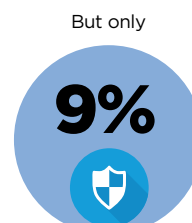
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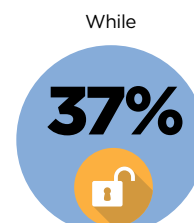
NATWEST BANK'S 2017 LEGAL BENCHMARKING REPORT SHOWS A SIGNIFICANT PORTION OF SME LAW FIRMS HAVE BEEN AFFECTED BY CYBERCRIME – THOUGH IT'S WORSE IN SOME AREAS THAN OTHERS



of UK SME firms suffered a cyberattack or fraud-related loss in the past year



of Scottish SME firms were hit by an attack in the same time



of northern SME firms were struck by cybercrime in that time





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# DEVELOP YOUR AMBASSADORS



Polly Jeanneret, LPM's HR guru, on ex-employees, OTT social media, and competitive behaviour

**Q** Recent 360-degree feedback on a partner was that he tended to prioritise his own work/team at the expense of the whole department. How do we get him to be less competitive and cut off from his peers?

**A** Wow, he sounds like he played far too much Risk in his childhood. All that 'world domination' and 'winner takes all' has gone to his head (perhaps he should go into politics). Somehow he thinks that if he pushes his own clients and his own people, he'll be rewarded by the firm. Your task is to show that the opposite is true. It's a fundamental re-learn. Good luck with that.

**Q** A solicitor is leaving after difficult discussions over

performance. Do you have any advice on how to keep an ex-employee sweet?

**A** There is a legal answer to this but I'm not sure this is about the legal. The lawyer's perspective is to get the employee to sign up to heavy duty confidentiality obligations and gagging clauses to prevent them from leaking information or making negative comments about you. But I have advised on a lot of exits over the years (possibly thousands, I have stopped counting), and silencing an ex-employee can be a counter-productive strategy – it's based on a lack of trust and cynicism.

Ex-employees are actually alumni. They're ambassadors for the firm whether the firm likes it or not – even if you'd

rather have nothing to do with them. So be nice, respectful and fair. Is that possible?

**Q** One of our younger partners has quite an OTT LinkedIn page. It includes a quote from a client in his profile that we think is way too flattering. Can we ask him to take it down?

**A** It's the LinkedIn equivalent of fake news, isn't it? The answer is, yes, immediately. The firm and its staff's online presence is too important. At a conference, I heard Google say that over 2m law-related searches were made every day. LinkedIn is your firm's shop window yada yada.

Though client endorsements are, like TripAdvisor reviews, part and parcel of life (even if they shouldn't be), there's endorsement and there's barefaced exaggeration. Anything that reads like the partner wrote it and not the client is embarrassing. Anything that is borderline false could get him into trouble with his regulator. **LPM**

**Polly Jeanneret is an expert in HR and an employment lawyer at Halebury to boot – she's seen and heard it all.**

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## BOOK REVIEW

# THE BIONIC LAW FIRM

**R**obots in Law provides a useful insight into the different adaptations and forms of legal AI, including virtual legal assistants, chatbots and expert applications. I found it useful reading about how AI can work in specific areas of law and perform set tasks in delivering legal services. On reflection, the book has reaffirmed my understanding that there is no all-encompassing AI that does everything (yet), but there are narrowly targeted machine learning systems that can be taught to perform tasks better than humans. The potential of AI, with its scalability, cost-effectiveness and knowledge retention capabilities is very difficult to argue against as you read on – especially when the book recognises the prospect of widening access to legal services to those that can't afford them.

The big question, on whether AI will eventually mean less need for 'human' lawyers, is tackled head on with sensible arguments on how AI can reshape law firm models by handling more routine work currently being carried out by junior lawyers. This will inevitably lead to AI replacing lawyers in some ranks and specific areas of law. Commentators also suggested that AI will create more work for skilled lawyers (though new skills will be needed) and enhance their roles by enabling them to spend more time on valuable client work. This suggestion reminded me of the predicted extinction of bank cashiers when ATMs were introduced, but in fact cashiers doubled because they could focus on other customer needs.

The book does have an emphasis on magic circle firms, but raises an intriguing concept of 'pay-as-you-go AI' – companies offering document analysis tools where machine learning (or teaching) is done in-house. This plug-and-play model means AI could be accessible to law firms of all size without a big outlay. As I work in a busy SME law firm, this model certainly is of interest to me – but it also got me thinking that it's important to assess what you're looking to gain from AI in order to stand a chance of it being successful. Do I want to gain internal efficiency? Could I use AI to capture the knowledge of lawyers and digitise their expertise? How will it impact our personnel and pricing models? Could AI offer a competitive advantage or open up new services for clients? Could a robot write a better book review than me? Perhaps. There's no magic bullet in the book, but as I continued to read further I found myself scribbling notes on my own thoughts and ideas on AI for my firm. I would recommend



**Robots in Law: How Artificial Intelligence is Transforming Legal Services by Joanna Goodman**



*Reviewer: Richard Hill, practice director, Stepien Lake*

**Publisher:** Ark Group  
**Publication date:** November 2016  
**Price:** £99.99

going through the references as there is some useful further reading.

I still believe that AI in legal is only scratching the surface (compared to what it will be in, say, 20 years) but the extent to which AI is being invested in will still surprise many. Personally, I thought the most interesting section of the book was about the 'law tech' startup phenomena with collaboration between venture capitalists and investors, law firm incubators, university tech clusters and tech companies.

Joanna Goodman doesn't shy away from some of the practical challenges faced by AI, such as implementation (yes, law firm culture could be a hindrance ... shock and horror) and impact on the value chain. There is an argument that the current regulatory framework covers legal AI, because while it doesn't directly regulate it, regulation is based on the idea that humans are responsible for using AI machines. I do wonder how you can monitor and oversee something many don't understand – such as intelligent algorithms or mysterious deep learning – but then isn't it the output that matters? What I have taken away from the book is that legal AI doesn't just 'happen'. Machine learning offers great opportunity but doesn't come easy. You must have the data sets, the expertise and integration with legacy systems, and involve lawyers and, most importantly, have the time and dedication to teach the machine – which is a continuous process.

Overall, this was a useful book – particularly its examples and expert opinions on what stage legal AI is at. If you think AI is overhyped, read Rohit Talwar's predictions in the last chapter. The robots are coming. **LPM**

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# FOLLOW THE LEADER

ALAN COUSINS, PRACTICE DIRECTOR

“ *Successful organisations have both effective leadership and effective followship, only with strong and enthusiastic followship can the leader excel.* ”

There are plenty of business gurus that are happy to charge significant fees to come in and tell you what good leadership looks like – and how important it is to the success of your firm. What they usually omit, however, is how important it is to have strong and effective followers. I call this ‘followship’, which is essentially the willingness of staff to engage with and support a business leader. Followship is hugely important, because only once it’s achieved can the firm’s aims and objectives be realised.

First, strong and effective followship from a firm’s executive group will strengthen the confidence and resolve of its leader – and significantly improve his or her prospects of being a good manager. On the other hand, poor executive followship may have detrimental effects on the leader and, ultimately, the business. A wilful lack of followship from executives can deflate even the best leaders – making them less effective and preventing them from being great managers. Competitors are also likely to hear about friction at the top level of the business and seek to capitalise on it.

Key clients and referrers may become aware of hostility in the business – and the carefully crafted image of the firm as a well-managed and professional entity may be tarnished. Staff also often pick up on negative vibes from the top of the organisation and find it very unnerving.

Strong and effective followship at the executive level has the opposite effect, and will improve the general feeling of wellbeing and engagement of staff. The leader can encourage followship by understanding the necessary interplay between management and staff – enabling them to work

together in ways that value the unique competencies of individuals. It’s important for the leader to respect the views of different people and take time to understand what motivates them. In this way, individuals are given confidence to take up roles within the group that fit their competencies and enable them to contribute – inspiring confidence in the leader.

But the group also needs to understand what constitutes unacceptable behaviour. This can be facilitated by individuals signing up to a document that clearly sets out what’s expected of a partner with defined partner-level responsibilities. This must include the responsibility to engage with the leader in good faith and be supportive of group decisions. It’s not acceptable, for example, for employees to constantly challenge ideas and point out what’s wrong without coming up with practical alternative solutions and remedies.

Everyone understands the importance of effective leadership for a business to reach its full potential, but don’t necessarily understand this won’t happen if individuals refuse to follow.

Of course, it’s important that individuals retain their independence and hold their leader to account, but this must be done in a fair and constructive way. By this I mean that individuals or factions mustn’t scheme behind the leader’s back and undermine their efforts.

Successful organisations have both effective leadership and effective followship. Only with strong and enthusiastic followship can the leader excel, enabling the executive group to work together as a combined force working towards the full potential of the business. **LPM**

## ABOUT

Alan Cousins  
Practice director  
Paris Smith  
[www.parissmith.co.uk](http://www.parissmith.co.uk)

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# BATTLE OF THE BRANDS

RYANNE KERSTEN, BD AND MARKETING DIRECTOR



*“Reputation is the most easily targeted asset of a business or brand, and it can cause tremendous damage.”*

## ABOUT

Ryenne Kersten  
BD and marketing director  
Bates Wells Braithwaite  
[www.bwbllp.com](http://www.bwbllp.com)



**Revenue: £22.2m**

**Corporate status: LLP**

**148 fee earners,  
249 total staff**

**Offices: London**

Building your profile and reputation isn't easy and takes years. Sure, you may have excellent lawyers, lots of good traits, score high in the legal directory rankings, and have big sexy names on your list of clients. But your place at the top can come crashing down if your reputation comes under attack. This can happen because of something you've done, failed to do, or said, something your client has done, or simply because someone has it in for you. Reputation is the most easily targeted business asset, and a bad reputation can cause tremendous damage.

Other than putting up with the occasional bad lawyer joke, law firms had it fairly easy. But now they've become increasingly prone to public scrutiny.

When your firm's reputation is under attack, who will you turn to for an appropriate response? Your press officer, marketing department, management board, client relationship partner, media litigation lawyers, or an external communications adviser? The answer obviously depends on the issue, but there are a few things to say about the individual roles each of them could play.

Too often law firms respond to reputational issues as a matter of legal principle rather than one of perception, and lawyers get stuck in a discussion about who's to blame. But clients or the public are rarely interested in whether you're right or wrong from a legal point of view. What the public really wants to know is whether you're a party they can sympathise with, whether you're nice and genuine, rather than defensive or evasive. As such, lawyers may not be your best advisers while articulating your response – but knowing your legal position while you do makes perfect sense.

A response can sometimes be as simple as making an apology. Often lawyers see this as a form of defeat or an admission to being wrong, however this does not need to be so. It's simply an acknowledgment that someone got hurt or offended. This may not be your fault, but neither would you wish people to feel this way – that's really what you're saying, and at least it makes you more likeable.

External advisers do bring an objective and calm voice and reassurance to the situation – which is helpful for the management board and keeps partners' personal views in check. If you seek advice from external advisers, make sure they work well with your press officer and marketing department. Let them be your background advisers, but not your spokespeople if you can help it – it could create the impression that you let others do your dirty work and have something to hide.

The best tip I can give is to always be prepared and have your team ready with a good process in place. Managing reputation can be time sensitive, so you'll need to be able to remain calm under pressure and be prepared to react within minutes. In a crisis, you may end up spending far more time managing your own people internally than the media and external factors which are affecting your firm. Your internal communications advisers often know your people and the firm well, so listen to them while communicating with your people. Make sure you form a united front – and keep your people close. **LPM**



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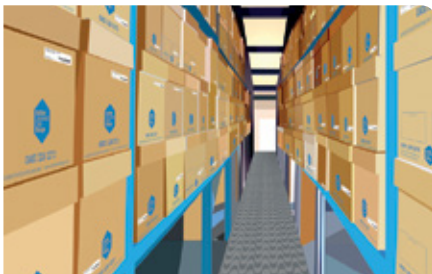


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# LOW RATES, BUT FOR HOW LONG?

JANINE PARKER, THE BROKER



“The reality is that, sooner or later, the situation will change. The economy will adjust and interest rates, however slowly, will rise to fend off any potential inflationary and currency issues.”

We have recently finished the new 'mini solicitors' renewal season that now exists in the professional indemnity market place. Many firms now renew on 1 April, whether on an annual basis or by taking advantage of locking in their rate with an 18-month policy. Many firms are also enjoying an increase in fee income, which is just as well because there is to be another increase in insurance premium tax (IPT) to 12% – frustrating, given this is a tax on a compulsory purchase.

The good news is that initial estimates would suggest a saving in rate on income of around 10%. This is another significant reduction in a market that has seen year-on-year rate reductions since 2011. But how long these reductions can continue without insurers creating loss-making portfolios remains to be seen.

While we're still in a relatively benign claims environment, insurers are still paying out significant claims. Property remains an area of high risk in this respect, and one area that experiences significant claims, no matter where we are in the economic cycle, is wills, trusts and probate.

At all times it would be prudent to remember the lessons learned after the last credit crunch. Disciplined file management, attendance notes, records of instructions received and especially undertakings are all an essential part of maintaining good risk management.

So, why do we continue to see rate reductions when margins for insurers are being squeezed? There are several factors that can be put forward: outside investment in the insurance industry is still high given interest rates and therefore

insurance continues to offer an attractive ROI.

This excess of capacity means that rates continue to be driven down and it will only be when this slows down that we may see an adjustment.

Timing – professional indemnity insurance is long tail business, and usually insurers don't know the accurate claims position of their portfolios until after four years. Finally, solicitors still pay a higher rate than all the other regulated professions – which is attractive to insurers that require income and was very apparent during the build-up to the recent 1 April renewal date.

The reality is that, sooner or later, the situation will change. The economy will adjust and interest rates, however slowly, will rise to fend off any potential inflationary and currency issues. From the macro market of solicitors' PI, the patterns, underwriting behaviour, pricing and market manipulation all feel very similar to 2005 and 2006.


In addition, we don't know the impact Brexit will have on our economic output and it's highly likely we won't know for at least five years if indeed we will ever know at all.

All we can do is manage the factors that are within our control. Ensure that your file management and risk procedures are being adhered to by all staff. Make sure that your business is financially secure. Consider levels of borrowing and costs closely. Indeed, consider whether the costs that you charge for your own services are sustainable for your practice – less can be more. No matter what the future holds, ensuring your practice is running on a solid and sustainable foundation will stand you in good stead for the present and the future. **LPM**

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# M IS FOR MEASURABLE MARKETING

GRAHAM MOORE, THE DATA GURU



**“** Combining disparate sources of data to produce cohesive, actionable information is often a challenge. But just because it's difficult isn't a reason not to do it. **”**

One area of business that's notoriously difficult to monitor is marketing. Developments in online marketing have made it far simpler for businesses to measure basic activity over recent years – with metrics such as the number of hits on a web page, number of reads, likes and shares of an article, and the number of followers and connections on social media. Online marketing quantitative feedback is also much easier to measure than perhaps traditional print or broadcast advertising.

But that isn't the whole story. The holy grail of marketing analysis is to fully track and quantify every prospect, from initial contact through to sale, delivery and payment. Yet that still isn't easy – not even with the explosion of raw data now available from Google Analytics, LinkedIn, Facebook, Twitter and so on.

The first step to better marketing measurements is to design your management information based on 'smart' objectives – including M for measurable. If your firm has these well-defined objectives for firm-wide goals, which are supported by specific objectives for business development and marketing, then the KPIs and supporting management info required will be clear.

There are two objectives that I regularly see progressive law firms aiming for. The first is obtaining a better understanding of existing clients – so they can focus marketing activity on attracting 'good' clients. The second is refining marketing spend by analysing both the value and acquisition cost of new clients.

Defining good and bad clients is a matter for each firm's broader business objectives – but elements that feed into this should go beyond a simple analysis of fees billed in the past year. Many firms don't regularly assess the value of clients in terms of either profitability or the value of credit they give in terms of work in progress and debtors.

An analysis of existing clients should also include retention levels, repeat business and cross-selling. All this information can be derived from the basic matter, time and billing records kept by all firms.

For well-defined campaigns and events, capturing marketing spend is usually relatively straightforward – but translating that spend into cost of acquisition requires linking those campaigns to new inquiries and those inquiries to actual instructions. In many firms, this raw data is spread across multiple systems – typically a practice management system, a separate CRM system, or Excel spreadsheets.

Combining these disparate sources of data to produce cohesive, actionable information is often a challenge for firms. But just because it's difficult isn't a reason not to do it. What's the alternative? Only measure things that are easy to measure? That path leads to the default of running a firm while only measuring time and billing.

Measuring the value of clients from different sources can provide further insight. If some sources are delivering clients that meet the firm's target profile, while others are introducing low profitability work with poor payment records, where should future marketing spend go?

Law firms typically have access to more data relating to clients and new business than ever before. But the challenge is to turn that into actionable information – and while that isn't always easy, it's surely worthwhile. **LPM**

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The management team at MLP Law speaks to Patrick Wingrove about their growth story – and how business support was key to their success

Many law firms don't see growth as a necessity – and they enjoy talking about it about as much as lawyers like talking about money with clients. North-west firm MLP Law, on the other hand, has made every effort to scale over the past few years and isn't shy about its progress.

The firm increased its revenue by 42% last year and has seen considerable growth across its departments – but how did it achieve such growth? MLP's managing partner, Stephen Attree (pictured centre), says a key component of the firm's development has been providing high-quality support and training to employees.

"The firm has consciously supported staff since its inception in 1989, and I've worked to continue that legacy since I became managing partner in 2014. We've made an enormous investment in our people and that's enabled them to do the best job they can."

Attree adds that the firm constantly works to upskill its fee earners and business support staff to create a 'cycle of good service'. The firm has invested in external training for customer service, billing and lock-up, negotiation techniques, and clear writing styles.

"The better trained business support staff are, the better they can do their job and support solicitors. The better trained and supported lawyers are, the better the service they can provide clients."

Leanne Sodergren, practice manager at MLP (pictured right), agrees, and says that an excellent example of the cycle of good service lies with the firm's accounts practices.

From left to right: Steve Hartley, head of corporate and commercial; Stephen Attree, managing partner; and Leanne Sodergren, practice manager.



## LPM FIRM FACTS

**MLP Law****Revenue: £1.9m****Corporate status: Limited company****22 fee earners, 31 total staff****Offices: Altrincham, Liverpool, Manchester**

"We train our solicitors to raise bills in a timely manner, and pre-agree billing times with clients. But we also have a knowledgeable and organised accounts team that can chase fees at regular intervals if required to ensure steady cashflow. In this way, the team ensures that the business keeps running and helps maintain the client-lawyer relationship." She adds that a 2015 MLP report showed 64% of businesses suffered late payments which cost them up to £15,000 a year. "We made this study to show the benefits of good financial hygiene to clients, but it's also a high priority for the firm and part of the reason we've scaled so rapidly," says Sodergren.

But MLP's commitment to staff doesn't end with training. The firm strives to ensure that every member of staff feels like they're part of a team and knows the business inside and out. Attree says that this involves maintaining a high level of financial transparency within the firm and ensuring that managers/partners deliver a consistent message of unity across the business.

"We share financial statistics internally so that everyone knows how the business is doing and what they're working towards. We want everyone in the business to know that the firm's success is a team effort and that they're valued members of that team."

Attree says great unity helps the firm run as a well-oiled machine, but also makes it easier to recruit talented people who can help develop the business.

"There are lots of great, hardworking people out there who want to work for a business that treats them with respect and gives them something to work towards. And in the era of social media, where everyone knows what everyone else is saying about your firm, it's important for current employees to respect and appreciate your brand if you want to attract great new staff."

The firm's ability to recruit talent was

vital for its expansion, as new staff helped to develop the firm's legal services offering and improve client service.

"We've hired some excellent people over the past two years who have helped the firm develop its employment, corporate, commercial and wills, trust and probate services – which all grew by over 64% between October 2015 and 2016," says Attree.

Steven Hartley, MLP's corporate and commercial director (pictured left), joined the firm in 2015 and says his department grew by taking on a mix of corporate transactional work, continually strengthening working relationships with existing clients, and acquiring significant new business.

But perhaps more importantly, MLP improved its offering by delivering services the way clients wanted them.

Hartley says: "Growing a business is all about putting yourself in the client's shoes and asking how you can best serve them. MLP, for example, launched MLP Flex – which is a retainer-based solution that allows clients to spread work and costs over a one-to-two-year period."

Attree adds that the firm has also adopted a mobile working set-up so staff can work flexibly and lawyers can meet clients when it suits them.

"The days when firms could expect all

"Growing a business is all about putting yourself in the client's shoes. MLP, for example, launched a retainer-based solution that allows clients to spread work and costs over a one-to-two-year period."

clients to meet during working hours are gone. Solicitors need to be able to meet clients when and where it suits them, which is why it's important for firms to have some kind of flexible working." He adds that the firm has started home visits with its wills, trusts and probate team and may extend this to other areas in the future.

Another component of MLP's business that perhaps makes it stand out from the competition is its Brexit knowledge hub.

Attree says: "We developed the online hub to publish updates and current information on Brexit and how it could affect our clients. It's important in these times of uncertainty that our clients have all the information they need and we feel it adds value to our service." The hub may also be an investment in the future – because once the realities of Brexit set in, businesses looking to prepare may think of MLP and go to the firm for legal advice.

And how is the firm going to develop and make sure it keeps growing in the future? Attree says the firm is planning to invest in technology to make it more efficient and collaborative.

"We've already bought a client relationship management and case management system, and we're planning on investing in other legal tech solutions to automate unremunerated work, such as document production, and drive efficiencies. IT will help us develop client relationships further and provide a more competitive service."

But Attree also has plans to potentially develop employees' standing within the business and help them to be more engaged in the firm.

"In January 2017, the firm converted from an LLP to a limited company business structure. This was, in part, to support our growth and I'd like to look at how we can give staff the option of buying shares and gaining a greater stake in the company." **LPM**



SUPPLEMENT MAY 2017

# LPM

LEGAL PRACTICE MANAGEMENT

In association with



# CLOUD LEADERS

*Why are SME law firms moving  
towards a cloudier future?*



# SKIES THE LIMIT

*SME firms are starting to recognise the enormous potential of the cloud – but how have different firms with different needs made the most of it?*

Cloud computing has made inroads into the SME legal market – but we, and our sponsor **Pulsant**, wanted to know why. We conducted this research to find out if keeping data and systems online has enabled firms to be significantly more competitive – and, more importantly, how?

For some legal businesses, we imagined, cloud was adopted to drive up efficiency – and for others to drive down overheads. But we also wanted to know how different firms, with very different clients, needs and business models, use the cloud to meet their needs. IP and shipping firms, for example, have international clients so always needed to be mobile – so has having systems online enabled them to do that better?

Fortunately, the results did not disappoint. Thanks to help from the LPM community and Pulsant, we now have a much better idea of how SME firms are keeping ahead in the cloud. [LPM](#)

Patrick Wingrove, supplement editor  
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**Coming up cloud:** We find out why firms are embracing a cloudy future



## INTRODUCTION TO THE RESEARCH FROM OUR SPONSOR: NICK HAYNE, BUSINESS DEVELOPMENT MANAGER AT PULSANT

# EVERY CLOUD HAS A SILVER LINING

Over the past few years, the cloud has been firmly on the business agenda for most organisations. Whether these businesses have been looking at cutting costs, streamlining operations or becoming more agile, cloud IT has often provided the answer. And in the legal industry, where cloud adoption rates have been a little behind the mainstream, the appetite for cloud computing is clearly growing.

Of course, the legal industry is characterised by strict adherence to regulation and compliance, which can make the cloud discussion more complex – and today's cyber threat landscape brings greater complexity and uncertainty into the mix.

But cloud has matured a great deal from its early adoption, which is one of the reasons law firms are more readily adopting various cloud models. Compliance, security and data privacy remain key considerations, but with the depth of cloud options and services available, the barriers of the past have been largely overcome and there is an increased desire to benefit from this technology – whether that's in email hosting and document management, or billing, and risk and compliance.

The discussions IT managers are currently having are not around adoption or migration necessarily, but more about where cloud can play the biggest role or add the most value in their legal businesses. Initially cloud was seen as a cost saver or a means to make organisations more flexible and scalable. But as cloud has matured, so too have the solutions around the technology. Simply put, there is more to the cloud than storing data.

Areas such as business continuity, disaster recovery, and even collaboration and productivity, have been affected by the cloud paradigm. When deployed 'as a service' these types of solutions bring additional benefits to operations, from better efficiency and effectiveness to meeting compliance. Taking business continuity as an example, cloud can help you create, implement and test plans – incorporating vital elements such as disaster recovery as a service (DRaaS). Cloud-based disaster recovery is a cost-effective and efficient way of making sure you can resume operations following a disaster, be it a network failure, cyberattack or act of nature.

Looking at the cloud models themselves, just consider the buzz word of the moment – hybrid.

*“The discussions IT managers are currently having are not around adoption or migration necessarily, but more about where cloud can play the biggest role or add the most value in their legal businesses.”*

Hybrid models are a mix of private and public cloud services, allowing you to keep the data and applications you need to in-house, or in a private cloud environment hosted by a trusted provider, while using the scale and cost-effectiveness of public cloud for hosting those systems not governed by compliance or for development.

The legal landscape shifts constantly, shaped by external factors like legislation and cybersecurity, and wider issues that will impact operations, such as Brexit. Some of the challenges brought about by these changes make it increasingly difficult for law firms to be competitive and productive. However, while cloud does not solve all problems and certainly is not the answer to all questions, what we are finding is the demand to see where cloud can add value and where these benefits can be fully realised. **LPM**



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# COMING UP CLOUD

SME firms are embracing the cloud – but how has it helped them improve their businesses? We polled and interviewed SME law firms to find out

Why do law firms love the cloud? Not too long ago, SME legal leaders wouldn't have dreamt of keeping vital IT systems or client data outside their offices – but it seems many have now embraced the opportunities that can bring.

According to LPM's cloud leaders research, carried out in March/April 2017, many firms have moved a lot of their IT online. Almost half (48%) we polled have over half of their total IT systems in the cloud or as part of a managed service. And though as much as a third (32%) of firms have only 10% of their systems there, three-quarters of respondents said that more than half of their IT systems would be cloud-based or a managed service within the next five years. An additional 16% also said that at least a quarter of their systems would be there within the same time.

Why have so many SME law firms embraced a cloudier future? For many firms the short answer is: "Because it makes us more competitive." Agility was the second most mentioned benefit of cloud or managed service IT among SME law firms in our survey – perhaps unsurprising since flexibility often delivers significant competitive advantage. Depending on the firm, increased agility can bolster productivity by giving employees access to systems virtually anywhere, or enable cost-efficient scalability – allowing firms to introduce things or improve their services in ways they couldn't before.

Cloud or managed IT is also often more cost-

effective than fixed IT infrastructures – and can give SME firms access to crucial software solutions, with regular upgrades, or a level of service that they perhaps otherwise couldn't afford. For example, it can help firms to create a more effective business continuity and disaster recovery plan, and to better tackle cybersecurity at a fraction of the cost – which is vital in an increasingly competitive market where firms can't afford to be dead for even a few hours.

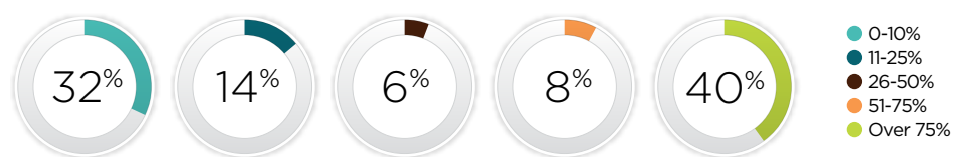
But while firms are undoubtedly getting ahead in the cloud, many are also missing the opportunities smacking them in the face. LPM's research suggests that while firms see agility, productivity and improved cybersecurity as key benefits of the cloud, they're missing a trick, because they don't necessarily relate those to improving client service – which is the real benefit all businesses should strive for.

## SKY HIGH PRODUCTIVITY

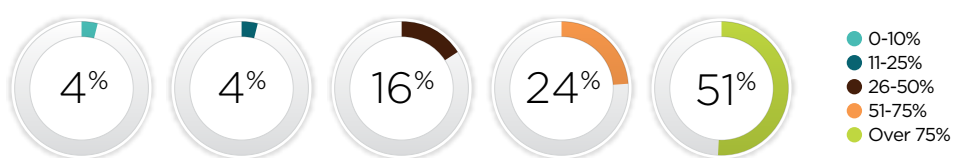
Productivity is a significant hurdle for any business, but one that cloud computing may well be able to improve – just under two-fifths (59%) of respondents in LPM's survey said it was a key benefit of cloud IT or managed service IT. This is particularly the case for law firms that have always had to be mobile but previously didn't have a way for employees to work on the road.

Elizabeth Baxendale, head of accounts and IT at London firm Winter Scott, says the increased agility cloud IT has given her firm makes it enormously

**Right now, how much of your firm's total IT systems are cloud-based or a managed service?**



**In five years' time, how much of your firm's total IT systems do you think will be cloud-based or a managed service?**



more productive.

"We're a niche firm that only does shipping law and our employees have always had to regularly travel to clients. Moving to the cloud has enabled them to get their administrative work done on the go – which has made us significantly more competitive." She adds that the firm is currently looking at expanding its IT provision to mobile voice recognition, empowering fee earners to draft documents as they travel.

Sarah Mitten, head of finance at Cheltenham-based Wiggin, agrees with Baxendale and adds that enabling staff to work as they travel was a much greater consideration than cost-savings for her firm when moving to the cloud. "Clients rarely come to us, we have to go to them – and it's enormously beneficial when fee earners can work anywhere, not just at the office." She adds that perhaps the key benefit of the cloud has been the impact on time recording – which is more up-to-date and accurate than before the firm's move to cloud computing.

Other firms haven't needed to be mobile in the past because of the impact it would have on productivity, but are now able to implement flexible working. Grace-Ann Pickles, finance and practice manager at Leeds-based firm Genus Law, says employees' ability to work flexibly has had a considerable impact on the business by allowing them to work more to clients' schedules.

"Having our IT infrastructure in the sky means staff can meet clients outside usual hours and keep up with their work. It also means that they can work when they need to travel between the firm's Leeds and London branches."

But it's not just a matter of employees being able to work

on the go – cloud IT also allows them to work from home. Tracie Linehan, office manager at Kent firm Fairweathers Solicitors, says that cloud-facilitated homeworking allows firms to give employees a better work-life balance and improve recruitment and retention without having productivity suffer.

"Many firms, such as ours, give staff a day at home each week – perhaps because they've got child commitments or they enjoy working at home occasionally. Having a cloud-based IT infrastructure means that they can do that and the business doesn't suffer."

## PURCHASE AND SCALE

But having increased agility doesn't only benefit productivity – it can also help firms scale cost-effectively.

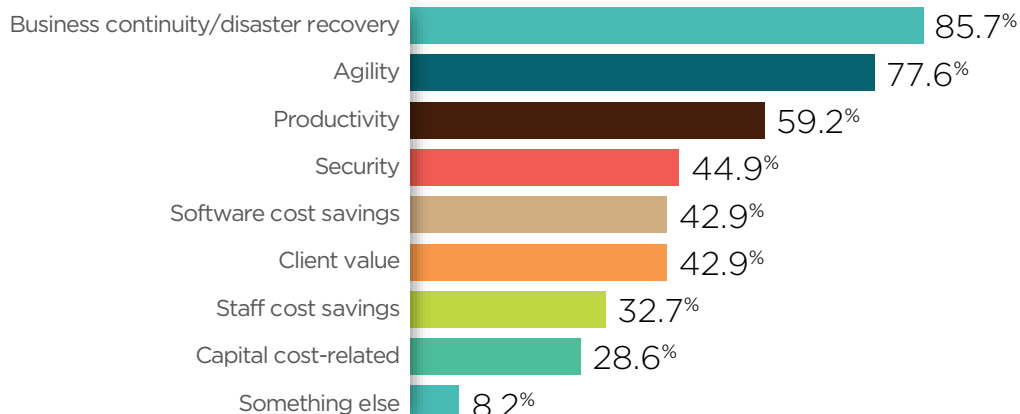
Chris Cann, head of compliance at Manchester firm Metamorph Law, says his firm is currently testing a hotdesking policy, where the firm will have more workers than desks for them to sit at.

"A hotdesking policy could help firms drive down costs of offices and can allow them to scale up their IT provision to accommodate new workers as they need." Graham Sweeney, operations director at Leeds-based Schofield Sweeney Solicitors, agrees with Cann and adds that his firm currently has more people than desks.

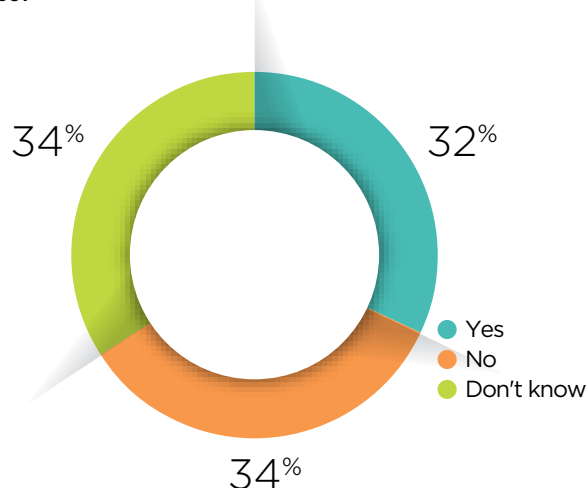
"We're in the process of getting more space – but before the cloud we wouldn't have been able to increase our workforce without first expanding our premises and IT infrastructure. Now we can bring on new people all the time with only minimal expense to IT."

But Peter Carr, IT head at Essex firm Fisher Jones

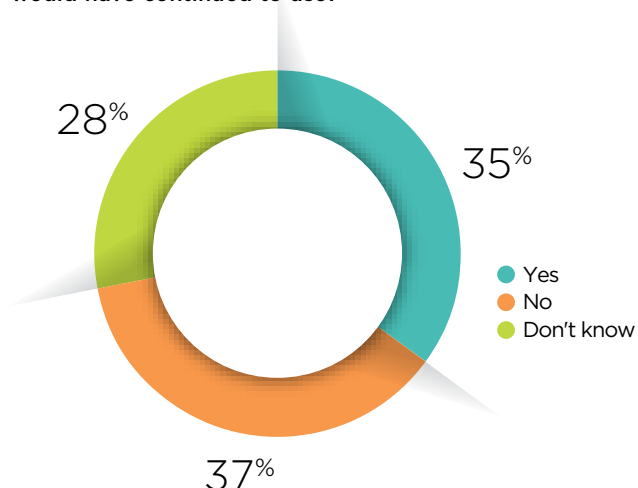
**What key benefits does cloud IT/managed service IT deliver to your firm?**



**Has going with a cloud option for an area of IT provision helped your firm afford or choose systems or services it would otherwise have been unable to use?**



**Has going with a cloud option for an area of IT provision allowed your firm to upgrade a significant IT software package it otherwise would have continued to use?**



Greenwood, adds that another cost benefit of cloud computing is that there usually aren't any surprises at the end of a financial year.

"The cloud costs us roughly the same amount each year as we pay for it on a per-user basis. If the firm has hired lots of new people then we don't have to invest in an expensive server to accommodate them. We just tell the provider that we need to increase our capacity and it's done in the flick of a switch." He adds that additional costs such as licensing fees are also wrapped up in the monthly cost of the solution.

## CLOUD COSTING

But the cost advantages aren't confined to scalability – firms can also use the cloud to drive down overheads on software, hardware and staff, and pass savings to clients. In LPM's cloud survey, 42% of respondents said software cost savings was a key benefit of cloud or managed service IT. Sweeney at Schofield Sweeney says the software saving potential of cloud computing is what initially attracted his firm to it.

"We moved to Office 365 largely because the licensing model for the cloud was significantly cheaper than a renewal-on-premise – particularly after taking Office applications and Exchange into account."

But Dinesh Raja, managing partner at London firm Bowling & Co Solicitors, says that the key cost-saving element of cloud IT for his firm was reducing the amount of capital spent on servers. "When we compared the cost of moving our systems to the cloud with bringing in new servers the choice was obvious."

In our research, 33% of respondents also said that staff savings was a key benefit of cloud or managed service IT. Raja, however, says his firm had to increase its IT workforce after adopting a cloud-based infrastructure.

"We had to hire more people to deal with the sophistication of this technology and security matters around it – though this was negated by the cost savings we reaped from getting rid of our servers."

Not everyone believes the cloud is inherently cheaper than traditional IT infrastructures. Keith Mason, IT and office manager at London firm New Quadrant Partners, says that in the long run cloud computing is more expensive.

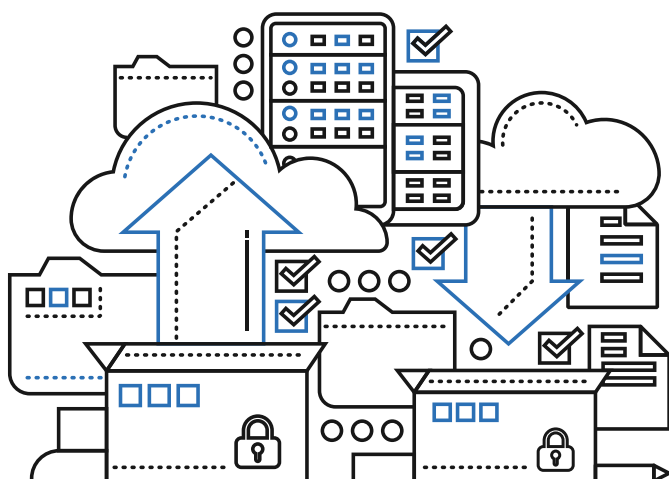
"A server system, that might last up to five years, while more expensive in the short term, is probably cheaper than the amount you spend on cloud IT over the same period. The benefits, however, outweigh the costs." He adds that though the infrastructure itself is more expensive, it allows the firm to do things it previously couldn't have afforded.

He isn't the only one – almost a third (32%) of our survey's respondents said that going with a cloud option for IT provision helped their firm afford or choose systems or services it would otherwise have been unable to use.

Raja says his firm reinvested the capital saved by getting rid of hardware and putting in cloud-based software.

"It's enormously benefitted the firm because staff now have access to state-of-the-art legal tech that helps them do their job better, and helps the business run better and makes it more competitive."

Similarly, over a third (35%) of respondents said a cloud



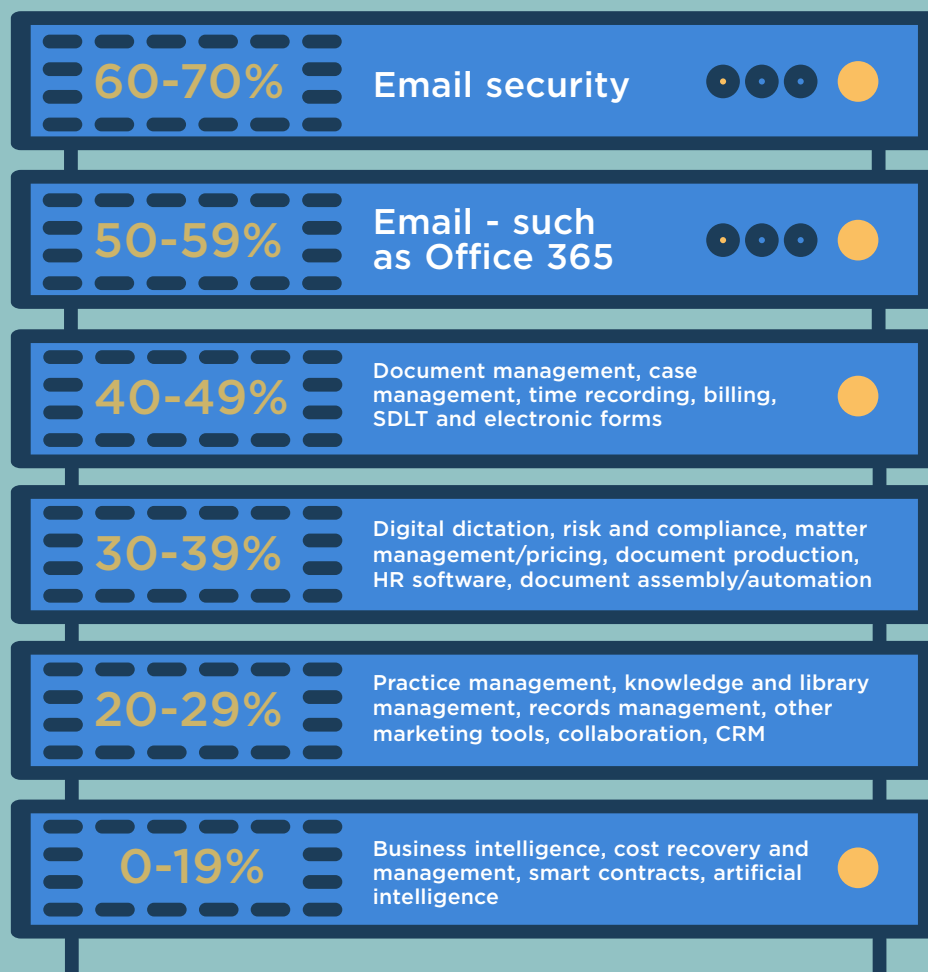


## WHAT'S IN YOUR CLOUD?

We polled the LPM audience in our cloud leaders survey to find out which IT systems, software or client-facing systems they have in the cloud or as part of a managed service.

Email security and email were the two 'top-scoring' systems – between 50% and 70% of SME law firms that responded to our cloud survey said they had these in the cloud or as part of a managed service.

But systems such as document management and case management were also popular choices – between 40% and 49% said they had those online. The least popular systems for cloud were those such as cost recovery and AI – hardly surprising about AI though, since it hasn't become widely used in the SME legal market, yet.



option for an area of IT provision allowed the firm to upgrade a significant IT software package it otherwise would have continued to use.

Carr at Fisher Jones Greenwood says cloud software is more expensive to use over a five-year period than a single installed solution, but it's more cost-effective because it regularly updates itself across the business.

"The software updates itself automatically, which saves costs of administration, and gives us access to the newest systems."

### SAFE AND SECURE

The new opportunities cloud can deliver to firms aren't just about competitiveness, they're also about making sure it's compliant and can survive in a world where there are more threats to SME businesses than before.

Mason at New Quadrant Partners says his firm moved to the cloud because of the potential it had to revolutionise its disaster recovery and business continuity plan.

"Before the cloud, creating a DR site would have been very expensive. Furthermore, in-house servers didn't have the same potential for business continuity – such as having employees work from home if disaster struck or recovering data quickly if it were compromised."

Mason's firm isn't the only one to move to cloud for

this reason – business continuity and disaster recovery ranked as the 'top' benefit of cloud or managed service IT in our cloud survey.

Linehan at Fairweathers adds that having data stored in the cloud is also extremely beneficial if the firm suffers a cyberattack.

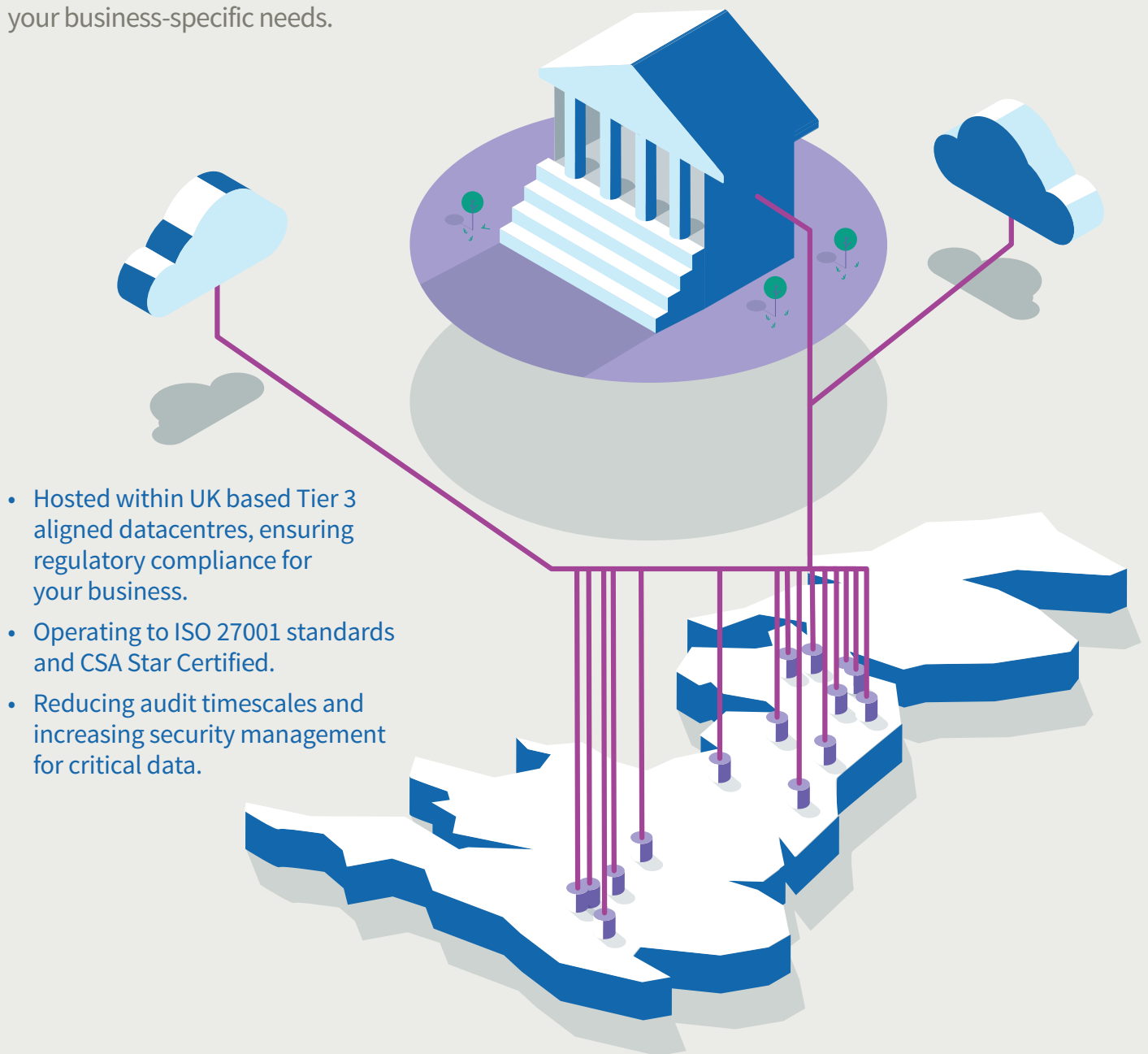
"Ransomware – which is where your systems become infected with software that encrypts your data – is a terrible hazard. I've heard several stories about firms that paid the ransom but didn't get their data unencrypted. If your data is stored safely on the cloud though, that isn't a problem."

Mason adds that cloud and managed service IT providers have far greater resources to tackle cybersecurity than SME law firms – which means that small businesses can now benefit from the infosecurity resources of larger organisations at a much lower cost.

While SME law firms were traditionally sceptical of cloud, they are now open to the competitive advantages it can offer – whether that be the productive and scaling benefits of increased agility or the cost savings of purchasing software that is continually updated and stored on hardware outside a business's premises. And cloud isn't just good for competition – it's also an excellent tool for compliance, keeping firms more secure and making them more able to recover if disaster strikes. [LPM](#)

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# LPM

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## AGENDA

08.30 Breakfast is on us, it's time to meet your fellow delegates

09.00 **Conference chair open**

*Shaun Jardine, CEO, Brethertons*

09.15 **A blueprint for a secure cyber future**

- How real is the threat, and how sophisticated are cybercriminals?
- Be a cyber leader – enhancing client experience and client data security through digitisation
- How to take a proportionate and pragmatic approach to reducing risk

*Tom Burton, director, KPMG (London) / Christian Toon, chief information security officer, PwC (Birmingham)*

09.45 **All change! Preparing for a major compliance shake-up**

- The implications of the SRA accountancy rules 2017 proposal
- Exploring the evolving responsibilities of COFA and COLP roles
- Destruction regulations for personal data and handling information requests post-GDPR
- Data protection and information security – compliance and competence
- The move away from prescriptive CPD and the introduction of statements of competence for solicitors

**Chair: Robert Bond, partner and notary public, data protection and cyber risks expert, Bristows**

*Katie Jackson, director, Honne*

*Steve Brooker, head of research and development, Legal Services Board (Birmingham)*

*Alison North, international business consultant, AN Information (Birmingham)*

*David Clarke, head of infosecurity, GDPR expert, Vciso (Birmingham)*

10.30 Morning coffee, networking and problem sharing

11.00 **Quality over quantity – finding an oasis of talent when the legal desert is dry**

- Attracting and retaining talent
- Self-determined job seeking – is this the end of recruiters?
- Offering workplace flexibility to recruit high-quality people
- Succession planning for SME firms
- Diversity and inclusion

**Chair: Sue Bachorski, head of human resources, Peters and Peters**

*Kris Phelps, group client account manager, Stonewall*

*Duncan Bradshaw, director of membership programmes, Stonewall (Birmingham)*

*Mavis Amankwah, award-winning entrepreneur, diversity and inclusion expert adviser (London)*

*Sasha Scott, diversity and inclusion manager, The Inclusive Group*

11:50

### LONDON ONLY streamed sessions

#### STREAM 1

##### **Blind Data Game with your host Anne Onymous**

With GDPR coming in May 2018, is it a burden or an opportunity? Our expert panel will outline your duties and obligations and guide you through this regulatory terrain.

- A risk-based approach to data processing
- The real impact of breaches on your SME business
- Creating a level playing field and global standard for data and privacy
- Maintaining business continuity through data protection

**Natasha Rawley, the file queen, ADDS**

*Alison North, international consultant, AN Information*

*David Clarke, head of infosecurity, GDPR expert, Vciso*

#### STREAM 2

##### **Breaking the mould: Examining non-traditional law firm models**

Learn about new ways to (re)structure your firm more effectively, and take a leaner approach to matter management and increasing profitability.

- Structuring an SME for maximum agility
- The pros and cons of 'dispersed'/virtual law firms
- Agile working rules – what are the health and safety implications for staff working outside the office?
- Working with alternative legal providers to grow your firm

**Chair: Lucy Scott-Moncrieff, Scott-Moncrieff & Associates**

*Warren Wooldridge, CEO, McCarthy Denning*

*George Bisnought, managing director, Excello Law*

*Chris Setford and Guy Setford, co-CEOs, Setfords Solicitors*

### BIRMINGHAM

##### **Breaking the mould: An examination of non-traditional law firm models**

Learn about new ways to (re)structure your firm more effectively, and take a leaner approach to matter management and increasing profitability.

- Improving your brand in a crowded market
- Structuring an SME for maximum agility
- The pros and cons of 'dispersed'/virtual law firms
- Rules around agile working – what are the health and safety implications for staff working outside the office?
- Making virtual law firms a reality
- Working with alternative legal providers to grow your SME business

**Chair: Lucy Scott-Moncrieff, managing director, Scott-Moncrieff & Associates**

*Warren Wooldridge, CEO, McCarthy Denning*

*Richard Beresford, chair, McCarthy Denning*

*George Bisnought, managing director, Excello Law*

*Chris Setford and Guy Setford, co-CEOs, Setfords Solicitors*

# REGISTER YOUR PLACE

Call James Raven on 0870 112 5058, or email [events@lpmmag.co.uk](mailto:events@lpmmag.co.uk)

Delegate fee: London £220+VAT, Birmingham early bird £175+VAT (£195+VAT after)

13.00 Lunch on us in the networking zone

## 14.00 Afternoon surgery sessions

Each surgery is centred on a theme, and delegates will have the opportunity to attend three sequential sessions. The format of each surgery may differ (eg presentations, discursive forums or workshops).

14.00 – 14.30

### **SURGERY 1**

Plus five minutes to select your next surgery session

14.35 – 15.05

### **SURGERY 2**

Plus five minutes to select your next surgery session

15.10 – 15.40

### **SURGERY 3**

#### **THEME 1**

#### **Exploring business development strategies around pricing**

- Fee setting – staying competitive
- Where work is coming from – analyse your pipeline
- Tendering and securing work effectively for a fixed price
- Pricing solutions/strategies for different practice areas (private client, crime, legal aid)
- Improving cashflow – billing the WIP, chasing debts and a structured accounting approach

*Graham Moore, Katchr – plus a law firm case study*

#### **THEME 3**

#### **Cultural evolution and revolution**

- Gen X are from Mars and millennials are from Venus
- Changing culture – progressing from lip service to honest and embedded changes
- Agility – cut costs and increase flexibility to attract talent
- L&D programmes to help you retain talent
- Plan to succeed with good succession planning
- Cultural evolution in a time of merger

*Joanna Kingston-Davies, group COO, Jackson Canter Group – plus a law firm case study*

#### **THEME 5**

#### **Pulsant Case study**

*Pulsant expert speaker and case study*

#### **THEME 2**

#### **Visualising the value and vulnerability of your data**

- Fortify your tech reputation with clients
- The practicalities of cyber and infosecurity
- Data deadlines – how long should you keep info and where?
- Improve accuracy and datamine efficiently
- Disaster recovery – what to do in the worst-case scenario
- Real-time applications of cloud technology

*Alan Cousins, practice director, Paris Smith (Birmingham)  
Richard Roebuck, managing director, Accesspoint (London)*

#### **THEME 4**

#### **Bribery, fraud and corruption**

- Requirements of the Fifth AML directive – the intense scrutiny that firms will be under and due diligence they must follow in relation to identifying and reporting financial crimes
- Risk and compliance issues under the Fifth AML directive
- Identifying threats and implementing a culture of compliance

*Daniel Berner, managing consultant, Lysis Financial, previously due diligence manager, RBS*

#### **THEME 6 (LONDON)**

#### **Business development strategies to accelerate profitable growth**

- Identify the optimal business development strategies to increase your fee income and profits without working more hours
- Assess what's holding you back from being more profitable
- Create a take-away action plan of what to focus on to increase your profits

*Michelle Peters, The Business Instructor*

15.45 Afternoon coffee, networking and problem sharing

## 16.10 New frontiers and black holes for legal IT

- The potential of cloud-based systems for the legal sector
- New innovations for technology in legal
- How can we prepare for change?
- What are the current legal IT challenges and influences?
- Where is legal IT heading in the future?

*Richard Roebuck, managing director, Accesspoint (London)*

## 16.35 LONDON – Digital v human

### **BIRMINGHAM – Using technology effectively to counter technology risks**

- A map of possible AI futures
- Idea generation – are we limited by our own vision?
- How is technology transforming business?
- The true sophistication of cybercriminals
- Five steps to cybersecurity – how to identify and eliminate the threats to your firm

*Richard Watson, author, lecturer, futurist in residence, Imperial College London (London)  
Andrew Sheldon, co-founder, CTO/head of innovation, Evidence Talks (Birmingham)*

## 17.00 Conference chair close

*Shaun Jardine, CEO, Brethertons*



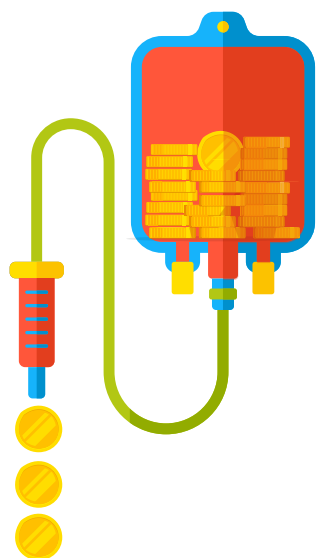
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# THIS TIME IT'S PERSONAL

Will the government's PI reforms fatally injure the industry, or can firms find new ways to drive RTA claims? Patrick Wingrove reports

The Prisons and Courts Bill was dropped just as this issue went to press, ahead of the 2017 snap general election. But if the government's PI reforms do go ahead in their current form, they could be disastrous for PI firms – and a re-elected Conservative government will likely come back to the bill, as it seems they have a drive to tackle perceived problems in the industry.

Huw Evans, director general of the Association of British Insurers, says: "Issues such as the increased cost of insurance for motorists and businesses and the £6bn bill for the NHS are not going to go away, so the incentives for a new government to act promptly are there."

Neil Sugarman, president of the Association of Personal Injury Lawyers, adds that the end of the bill for now is a relief to many, but the sector can't be complacent.

"There's a persistent political appetite for tackling a 'compensation culture', which does not exist to make promises of cheaper car insurance that won't be kept."

A permanent scrapping of the bill, which proposes to introduce tariff on whiplash, would be welcome news to PI firms – though it has no impact on plans to raise the small claims limit from £1,000 to £5,000 for road traffic accident claims. These changes, especially if they both

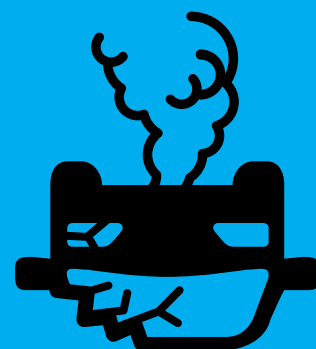
happen, could be extremely damaging to many PI firms' top and bottom lines.

A report from economics consultancy Capital Economics, commissioned by PI campaign group Access to Justice (A2J), suggests that the small claims limit rise for RTA could put a significant strain on revenues – since most RTA claims are currently valued at less than £5,000. Andrew Twambley, spokesperson for A2J and director of marketing consortium InjuryLawyers4U, says that this change will put thousands of jobs in legal at risk as many firms will need to shed resources or close altogether.

"The report clearly shows that if the government's PI reforms go through, a large portion of cases will cease to be cost-bearing and many legal businesses will need to make significant changes if they want to survive." But, he adds, the rise is made even more challenging by the introduction of a whiplash claims tariff – which sets out a unified table of payments that are significantly lower than current average pay outs.

"The current average payment for a whiplash injury lasting up to three months is £1,750 – but the maximum claimants can receive post-reforms for the same injury is just £225."

Kerry Underwood, PI blogger and senior partner at Underwood Solicitors, agrees with





Twambley, and says that the tariff could be the final nail in the coffin for whiplash claims.

"Whiplash comprises around half of RTA claims and the new tariff ensures that they will never cross the £5,000 threshold – unless the injuries are very serious." He adds that the overall claim would need to be above £10,000 to escape the small claims limit and be cost bearing.

But it isn't just the potential loss of revenues that could harm PI firms. Adrian Denson, chief legal officer at Southport-based Fletchers Solicitors, says that if the bill goes through firms could find it difficult to recruit and develop the business because of increased uncertainty in the market.

But despite the significant challenges rampaging towards PI firms they may well be able

## PERSONAL BREAKDOWN

Under the perhaps temporarily scrapped Prison and Courts Bill, personal injury would change significantly. Changes include:

- 1** Increasing the small claims limit from £1,000 to £5,000 for all road traffic accident cases.
- 2** Increasing the small claims limit from £1,000 to £2,000 for all non-RTA claims.
- 3** Introducing a tariff to cover whiplash and minor psychological claims resulting from road traffic accidents.

to adapt and survive – and perhaps even take advantage of the small claims limit rise. Neil Hudgell, managing director of London firm Hudgell Solicitors, says technology may well be the key to making most RTA claims viable – whether by driving efficiencies and reducing overheads or creating platforms to support clients in a cost-effective manner. He adds that firms specialising in whiplash and other RTA claims may also consider expanding and diversifying their legal services offering into areas that complement the business's skillset.

### PUSHING THE LIMIT

The reforms pose an existential threat to PI firms because they live in a low-margin world and need volume to prosper. Capital Economics' report, Economic value of personal injury claims specialists, suggests that over half of PI firms receive more than 60% of their income from sub-£5,000 claims – and could face a revenue black hole if the reforms go through.

Denson at Fletchers says: "Like most other legal businesses in this market, a significant proportion of our cases are under £5,000 in terms of damages. We've done our sums and are comfortable we will survive the changes because our core business of motorcycle claims falls outside of many of the proposals – but inevitably when such a significant proportion of firms' cases become subject to small claims costs, it will poke a massive hole their revenue."

The report also shows that the average profit margin for PI firms is currently just 13% – and it suggests that this figure is skewed by higher margins in firms that did small amounts of PI work. Once the reforms are implemented, however, margins are set to fall to unsustainable levels and more than one in four PI firms will lose virtually all their revenues.

Paul Drabble, branch manager and partner at national firm True Solicitors, says that after the changes many firms will be forced to downsize or simply won't be able to carry on.

"The personal injury sector has been under attack for quite some time and there have

already been some high-profile casualties. I suspect that if the reforms come in there will be other casualties and we'll see many more redundancies being made across the industry."

The Capital Economics report suggests that this may well be the case – 70% of the 27,800 workers employed by law firms for personal injury cases are at a "high risk" of losing their job. This is perhaps unsurprising since 40% of jobs in PI firms are in those that specialise in sub-£5,000 claims (where such cases make up more than 80% of their workload).

But some areas may be affected worse than others. Though employment in PI businesses across the UK will be affected, the report also shows that the north-west and south-east of England as well as Yorkshire and the Humber will be particularly damaged – potentially losing 9,000, 6,000 and 4,000 jobs respectively. Across England and Wales, however, 14% of all legal sector jobs could also be lost.

### WHIPLASHING MARGINS

Capital Economics's report, however, is an analysis of the potential outcomes of raising the small claims limit and doesn't take the whiplash injuries tariff into account. Domini David, head of personal injury at Howell Jones Solicitors, says that if the Prisons and Courts Bill is reinstated after the general election the tariff will likely cause further financial loss for PI firms that cover whiplash claims.

"To increase margins one of the only thing firms could do is increase their share of the compensation they recover – but if they're only recovering £225 the maximum success fee you can take is 25%, so it simply doesn't look economically viable?" Michael Wangermann, personal injury specialist and partner at Ashtons Legal, adds that even firms that find a way to continue whiplash claims will likely face increased competition from claims management companies that aren't regulated and can offer services at a cheaper rate.

But, David adds, it's not just a case of whether firms can afford to deliver competitive and profitable whiplash services, but whether clients will want to pursue claims that can only offer small payments. "Many consumers who have suffered a whiplash injury may go online, see what their injury is only worth £225 and decide it's simply not worth the hassle." Faced with plummeting margins, added competition and potentially apathetic claimants, will firms conducting whiplash claims be able to survive? Underwood says that while many firms will adapt by moving into or increasing their share of other areas of law, many others will close.

"There are around 800 firms that are so dependent on whiplash injuries that they won't be able to survive if and when the new system comes into place."

### BROADER PROBLEMS

Firms won't only have to contend with falling turnovers but the broader implications of uncertainty in the industry. Denson at Fletchers says it may be difficult for PI firms to attract talent if graduates feel they won't be able to

#### FIRM FACTS

##### Ashtons Legal

**Revenue: £17m**

**Corporate status: Partnership**

**174 fee earners, 330 total staff**

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

##### Amelans Solicitors

**Corporate status: Partnership**

**Seven fee earners, Eight total staff**

**Offices: Didsbury**

**Specialisms: Personal injury**

##### Underwoods Solicitors

**Revenue: £1m**

**Corporate status: Limited company**

**16 fee earners, 16 total staff**

**Offices: Hemel Hempstead**

**Specialisms: Costs and funding, employment, personal injury, family, employment**

##### Howell Jones Solicitors

**Revenue: £5m**

**Corporate status: LLP**

**35 fee earners, 80 total staff**

**Offices: London, Cheam, Leatherhead, Surbiton and Tolworth, Bordon, Walton-on-Thames, Kingston-upon-Thames**

**Specialisms: Personal injury, clinical negligence, marriage, residential property, wills and probate**





## HERE'S WHAT YOU COULD HAVE MADE

The government has proposed to introduce a tariff for soft tissue injuries suffered in road traffic accidents – which are significantly lower than current average payments.

### 2015 AVERAGE PAYMENT FOR PSLA FOR WHIPLASH INJURIES LASTING:



### PAYMENTS UNDER THE NEW TARIFF SYSTEM:

up to three months: £1,750	up to three months: £225
four to six months: £2,150	four to six months: £450
seven to nine months: £2,600	seven to nine months: £765
10 to 12 months: £3,100	10 to 12 months: £1,190
13 to 15 months: £3,500	13 to 15 months: £1,820
16 to 18 months: £3,950	16 to 18 months: £2,660
19 to 24 months: £4,500	19 to 24 months: £3,725

### FIRM FACTS

**Hudgell Solicitors**

**Revenue: £12m**

**Corporate status: Limited company**

**80 fee earners, 135 total staff**

**Offices: London, Leeds, Hull, Bristol**

**Specialisms: Personal injury, medical negligence, human rights, police misconduct**

develop their careers or find the same opportunities in PI as in other sectors.

"Every year we attend a graduate Q&A session at a nearby university to answer questions on why graduates should enter the exciting career of PI – but this year, more than previously, we were faced with increased scepticism about whether PI was the right move for them." He adds that PI uncertainty will likely make recruiting difficult in general, but particularly with millennials that firms are currently desperate to attract.

But, he says, many PI firms might not be recruiting currently because of the ambiguity surrounding the future of their businesses. Denise Wilkinson, finance partner at Manchester-based Amelans Solicitors, says market uncertainty is inhibiting investment in many PI firms and preventing legal leaders from making strategic business decision that could benefit the business.

"The problem with uncertainty – as I'm sure many firms are well aware of because of Brexit – is that it presents risk, and no one wants to make a move as long as that's the case." She adds that this is particularly the case for funders who are already wary about the PI marketplace due to previous high-profile collapses.

Drabble at True Solicitors agrees with Wilkinson and adds that, as an example, his firm was planning to develop an app to help clients navigate the road traffic accident market, but has since scrapped the project over uncertainty of whether it will be useful if the government's PI

"If firms automated RTA claims as much as possible, the service could be offered at a much lower cost."

Neil Hudgell, managing director, Hudgell Solicitors

reforms go through.

### PERSONAL ADVANTAGE

Despite the challenges ahead of them, however, some PI legal leaders are facing the potential reforms with cautious optimism – seeing them as a chance to increase profitability and take a larger share of the market.

Neil Hudgell, managing director of Hudgell Solicitors, says the reforms present an opportunity for many firms to Hoover up existing work that other legal businesses choose to shed, and gain a greater share of the market.

"If firms that have an innovative flair can find a way of making road traffic accident cases profitable despite the changes then they'll be able to take a much greater slice of the pie – at least for RTA cases other than whiplash." In the long term, he adds, firms need to invest in technology, implement the right systems and processes and drive efficiencies and cost savings without compromising the client experience.

Snapé at Graham Coffey & Co agrees and says that technology would be particularly useful in RTA claims because they're process-heavy and could stand to be highly automated.

"If firms invested in technology and automated as many of the administrative processes of RTA claims as possible – instead of leaving them to junior solicitors or business support staff – then the service could be offered at a higher or equal quality at a much lower cost." He adds that Graham Coffey, for example, has recently made moves to become a paperless business – since PI claims are document-heavy and could be processed quicker with greater automation.

And firms that can process cases at a faster rate may be able to take advantage of the increase in the small claims limit. Underwood at Underwoods says that though the increase means each case under £5,000 is worth less, they can

**Graham Coffey & Co Solicitors**

**Corporate status: Partnership**

**30 fee earners, 48 total staff**

**Offices: Manchester**

**Specialisms: Personal injury**

**True Solicitors**

**Corporate status: LLP**

**100 fee earners, 200 total staff**

**Offices: Newcastle-upon-Tyne, Birmingham, Ipswich, Leeds**

**Specialisms: Personal Injury**

**Fletchers Solicitors**

**Revenue: £16.4m**

**Corporate status: Limited company**

**203 fee earners, 348 total staff**

**Offices: Southport**

**Specialisms: Motorcycle accidents, serious injury, medical negligence**



"Not everyone is familiar with technology. Firms that do older people's cases will have clients that don't know how to use online platforms."

Paul Drabble, branch manager and partner, True Solicitors

be processed much faster.

"Outside of whiplash, RTA claims could become more profitable if firms automate processes and push work out to clients via online portals. They would make less on each case but could process far more of them."

Wangermann at Ashtons, however, says using technology to make RTA viable might not just be about workflow.

"In the future cases valued at less than £5,000 may still have to go through a claims portal. Firms could potentially create their own platform to help clients through this process – one where

they could potentially pick and choose what they need from a legal service and what they don't. It's just speculation at this point, but there are opportunities out there for PI firms that manage to take advantage of them"

But Drabble at True Solicitors points out that technology may present difficulties to firms that have an older client base. "Not everyone is familiar with technology. Firms that do older people's cases, for example, will have clients that don't know how to use online platforms or perhaps don't want to use them."

Though the Prisons and Courts Bill has been dropped for now, it's far from dead in the water since there is considerable appetite to kill the country's 'compensation culture'. If it comes back, many PI firms may face a huge hit to their revenue as well as recruitment and business development prospects. But hope isn't lost – at least outside of whiplash claims. Firms can continue to offer a high-quality service at a lower rate by automating processes – and make the small claims limit rise work for them. **LPM**

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# GUIDING HAND



Geraldine Collier, finance and practice manager at Dawson Cornwell, tells LPM about outsourcing IT support with Accesspoint Technologies – and how it's leading to better client service

London firm Dawson Cornwell doesn't have plans to scale, but wants to be the best family law provider in south-east England. The firm's finance and practice manager, Geraldine Collier, says: "Dawson Cornwell's key business objective is to be the best at what it does and provide consistently high-quality service to clients. The firm is well known for its expertise and has this year been shortlisted for Citywealth's magic circle awards for matrimonial firm of in 2016."

But, she adds, the firm is constantly looking for ways to improve client service – which is why it sought to revamp its IT systems last year.

"We realised that we needed to adopt new technology and transition into the 21st century if we wanted to improve client service – but we needed help."

To start its journey, the firm chose to outsource its IT help desk to Accesspoint Technologies, which would provide advice

and fix IT problems remotely.

"But Dawson Cornwell is a firm with a lot of personalities and we wanted someone to come and work with us in-house – so Accesspoint technicians now work in our office and have become an integral part of the business," says Collier.

But Accesspoint's mandate at Dawson Cornwell has evolved considerably since then, and they're now helping the firm to implement a new practice management solution. "The firm has long wanted a new PMS to drive efficiencies and help the business improve its client service – but the leadership team wanted to be sure it was investing in the right solution that would cater to the business's needs. Accesspoint has been holding our hand through the process – their advice has been vital and we wouldn't be able to do it without them." She adds that the firm's new PMS, due to be implemented in August 2017, will make the firm more collaborative and efficient, and

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where people make the difference

## LPM FIRM FACTS

**Dawson Cornwell****Corporate status: Partnership****30 fee earners, 40 total staff****Offices: London****Specialisms: Family law**

help it in its mission to be the best family legal services provider in the south-east.

## NEW SOLUTIONS

Collier says that Dawson Cornwell's staff currently draft matter-related documents and financial reports in Microsoft Word and Excel and are stored on servers.

"This can make files difficult to find and access if staff are out of the office. It also means that the finance department doesn't have the ability to produce ad hoc reports – and creating them wastes a lot of time that could be used to improve areas that affect client service." She adds that matter files are also often incomplete because emails aren't properly saved to them – which could create issues in the future.

"Having a new PMS is going to revolutionise the firm from the ground up. Everything will be in one place and fee earners will be able to access files remotely – which will help lawyers progress cases and interact with clients on the go."

She adds that there are numerous other advantages to having a new PMS solution, including instant ad hoc financial reporting.

"There are some enormous challenges to setting up a PMS, and since my understanding of IT is limited, Accesspoint's advice has been vital in helping us choose the right system based on our needs, and helping us integrate it into the business."

She adds that perhaps the most important service Accesspoint provides to the firm is training.

"The problem of any new system or process is the level of disruption it causes to the business. Accesspoint will help us deal with this by providing our staff with high-quality training – not just in how to use the new system but advise on new cybersecurity precautions to take and inform us on areas where mistakes could easily be made." She adds that she's very much a believer in 'teach a man to fish', and that this training will help the business become more self-sufficient and tech savvy. Though adopting a new PMS solution is challenging,

says Collier, Accesspoint's ability to listen and adapt to the firm's needs is making the process significantly easier.

"Some IT consultancies just tell you what to do, but Accesspoint actually listen to our concerns and work with us to find the best solution.

"For example, when said that having a remote IT help desk wasn't working for us they didn't just say 'well, too bad', they sat down and worked out how they could better serve us and came on as in-house outsourced consultants. In that capacity, they helped us network our printers and continue to be a vital part of our implementation of the PMS."

She adds that the software firm's response time is also excellent – which is particularly important for any SME law firm manager who wears many hats.

"As a small firm manager it's enormously helpful to have the excellent level of support Accesspoint provides. In larger firms you might have a finance director, HR director, facilities director and such – but I'm the key point of contact for all those things at Dawson Cornwell, and knowing that I have someone on-hand for our IT needs is a relief and would be for any SME firm manager."

But aside from the software firm's excellent service, Collier says, perhaps the greatest advantage of outsourcing the firm's help desk is the cost-saving benefits.

"We can increase and decrease the amount of time they work with us as needed, which has significant cost-saving benefits over hiring an in-house technician."

Though technology can help firms drive efficiencies and improve client service, it's important for them to have the expertise behind them to help them make the right decisions. Plenty of firms invest in solutions without thinking about whether the solution is right for their firm – or how the firm will adapt to the new system. According to Collier, firms should acquire the expertise of knowledgeable people, such as those at Accesspoint, to ensure that they know what they're doing and have someone on hand in case anything goes wrong. **LPM**

**“ Accesspoint's advice has been vital in helping us choose the right system based on our needs, and helping us integrate it into the business. ”**



# CLOUD NINE SECURITY

Nigel Redwood, CEO at Nasstar, on the changing cybersecurity landscape and how firms can prepare

Law firms are embracing a tech-led world and becoming more efficient, cost-effective and competitive in the process – but there’s a dark side to digital advantage. Cybercriminals are lurking at firms’ digital gates and finding ever more sophisticated ways of breaking through.

Nigel Redwood, CEO at Nasstar, says law firms are particularly attractive targets to cybercriminals because they hold large amounts of money and, perhaps more importantly, a cornucopia of valuable sensitive data.

The big problem, he says, is that SME law firm managers often don’t think their firms are targets because of their size.

“LPM’s 2017 Legal IT landscapes report showed that on a ‘threat scale’ of zero to 10, SME firms ranked cyberattack at 5.2. But they need to realise that the threat is much greater and should be ranked at least nine.”

Redwood says that SME firms can make

themselves more secure by acknowledging the threat, building up their security resource and outsourcing IT to a provider with a high-quality security service.

“Nasstar, for example, employs 190 technical engineers who work constantly to adapt to an ever-changing technical landscape. A firm’s IT department juggles multiple responsibilities – such as keeping the lights on and finding ways to make the firm more agile – and don’t necessarily have the technical resource or know-how to keep their environment safe.”

But just because a firm’s IT infrastructure is managed, he adds, doesn’t mean it’s completely protected against attack. If firms want the best possible chance against cyberattackers, they need the right procedures in place and a certain standard of staff training.

“Technology is important but so is awareness. GCHQ says technology can

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prevent 20% of breaches but it's people that stop the other 80%. That's why firms should be investing in a cybersecurity certification that gives them an understanding of how to buttress information security."

### SERVICED CERTIFICATION

The problem with managed IT infrastructures, says Redwood, is they can give firms a false sense of total security.

"Managed IT providers invest heavily in security but tech can only protect businesses to a certain extent. Cybercriminals see staff as the soft underbelly of a business – they're your digital gatekeepers and need to be trained to recognise friend from foe."

He adds that as law firms' staff become increasingly mobile, firms also need to prepare for threats outside the office.

"One of our clients recently suffered a man-in-the-middle attack – where a criminal sets up a wireless network with the same name as a nearby coffee shop, waits for someone to connect and intercepts their data."

But firms can equip their staff with the basic tools to question their environment and keep the business safe by becoming certified in the government's Cyber Essentials scheme or the international IT security standard ISO27001.

"The route to these certifications, however, can be long, complex and expensive – which is why Nasstar has developed its certification-as-a-service solution."

This solution, he says, helps firm adopt the critical criteria and compliance requirements to pass the ISO27001 and Cyber Essentials life cycle. When a firm isn't compliant, Nasstar sends certification specialists to recommend solutions to help it demonstrate advanced security.

"These certifications will help the business become cyber-ready, but they also show clients that the firm meets a certain standard of security," says Redwood.

He adds that cyber certification is an excellent step in the right direction, but there are lots of exercises firms can undertake to keep their staff on their toes.

"Once staff have been trained it's important to not let them become complacent and keep them aware that the criminals are still out there. Firms could, for example, send out white-hat attacks to see who falls for them and then inform them of their mistake." If firms are to test their defences,

managed IT providers such as Nasstar are on hand to give advice and help keep staff up to date with their cyber training.

### CLOUD FORTRESS

Redwood says that as well as having knowledgeable and cautious gatekeepers, firms should make sure their digital walls are thick, tough and regularly renovated to keep up with constantly evolving digital threats.

"But keeping up to date with the cybercrime landscape and preparing appropriately can put a significant strain on firms that want to focus on clients and cases. Fortunately, managed IT providers can help firms adapt, but they need to choose one that has information security at the top of its agenda."

According to Redwood, the technical side of information security is changing so rapidly that

even a managed IT provider with a state-of-the-art data centre would find it difficult to keep up – which is why Nasstar teamed up with cyberdefence company Falanx Cyber Defence to stay on top of cybercrime.

"Falanx works hand in hand with our technical teams and deploys agents to every single server in our seven datacentres.

These agents log events

which are then analysed by a machine-learning system to identify trends. By doing that we can identify that a client has logged a meeting with someone in Telford, and if they suddenly log into a PC in France then the alarm is raised."

Nasstar also has a professional services team that works with clients to ensure their own systems are secure.

"In that team, we've got what we call an ethical hacker, who will try and hack our customer systems. Wherever there's a web-facing environment for clients, for example, they will try to enter the business there. That way we can go back to the client and tell them where their weaknesses are and what we can do to fix them."

Though cybercriminals pose more of a threat to the legal industry than ever, SME firms can prepare and protect themselves. By testing systems and becoming cyber certified, firms can give their staff the tools and knowledge they need to protect the business. But the time and resources required to constantly buttress the business's information security can bring significant strain – so fortunately, managed IT providers, such as Nasstar, can provide the expertise firms need to make the process as easy as possible. **LPM**

“Cybercriminals see staff as the soft underbelly of a business – they’re your digital gatekeepers and need to be trained to recognise friend from foe.”



# DON'T DODGE A FASTER DRAFT



Roxanne Selby, head of small law firms at Thomson Reuters Legal UK & Ireland, on how firms can grab competitive advantage with document automation

Serving clients profitably is the second greatest challenge for law firms after attracting valuable clients, according to Thomson Reuters Legal UK & Ireland's 2016 report: Pedal harder, pedal smarter. Lawyers now need to address the challenge of clients who want more for less, and deliver better, faster, and cheaper legal services. The legal market is undoubtedly entering an era of unparalleled competitive intensity, and firms that fail to focus on profitability face a future that is, at best, uncertain.

Drafting is a core component of legal solutions and something that junior lawyers spend far too much time on – and often struggle to deliver and check quickly. It's far from revelatory to state that automating drafting is vital to reducing the cost of service delivery – and the technology to automate this critical competency isn't new.

Yet it's still not clear whether lawyers understand the correlation between this core, bread-and-butter business activity and long-term secure business

growth. Do they understand how these services increase output, or help the firm secure competitive advantage?

Reimagining your drafting workflow is central to reducing the cost of service delivery, and increasing a firm's ability to win and retain clients. Automating processes provides the chance to create consistency, manage margin, and free up fee earners' time to focus on personalised, added-value components of a legal solution. It takes firms a step further to the holy grail – that critically important, improved client service experience.

**Briefing** magazine's 2016 report, *Solving the automation puzzle*, showed that most top 100 firms' document creation processes are heavily influenced by automation technologies.

Where drafting solutions are purchased, many are chronically underused. Just 2% of firms surveyed said drafting automation or tools were fully utilised firm-wide – and while many firms evangelised the potential of drafting solutions, few realised all

the benefits.

In his book *Tomorrow's Lawyers*, Professor Richard Susskind refers to the “unhelpful if often romantic fiction” that legal work is bespoke – but does that notion persist with SME firms as well as large practices? Are fee earners still applying cottage industry methods to a modern world in which mass customisation has long become mundane? Clients select firms based on prior experience – and if firms aren't forward-thinking enough to use technologies to provide clients with a superior service, do they deserve to win them at all?

Not providing a top-range service is dangerous in a world where clients are actively looking to find the same solution for less money – so, reliance on traditional solutions is madness. Beyond pressure on costs and the move from hourly billing, wider factors such as employee engagement and retention make creative use of new technology essential.

Firms often acknowledge that clients would value more automation. Today's technology provides a myriad opportunities to reimagine practices and free lawyers from the tyranny of routine tasks. The reward: maximisation of business development, the freedom to focus on creative, added-value solutions for their clients, and, in turn, to build better relationships of trust.

Fee earners need to move beyond fear of change and worry over new risks. Thomson Reuters solutions avert risk by providing extra scrutiny to eliminate errors. According to a Thomson Reuters customer survey, using Drafting Assistant can save around 60% of the typical review time spent on documents – putting market-leading content

from Practical Law and research and analysis tools at your fingertips, and proofreading to ensure error-free, citation-correct documents. Contract Express now provides over 300 pre-automated templates and standard clauses prepared and maintained by the editorial gurus behind Practical Law. Users can quickly create bespoke versions of these templates for their use, and automate and use their own documents.

These solutions offer the opportunity to collaborate with clients, use electronic signatures, and store signed documents. With no risk of starting from scratch or from an old document, these solutions can result in a time saving of more than 80% from traditional methods, according to research from Thomson Reuters.

Our integrated suite of solutions puts firms on the path to full automation. Firms can begin with proofing and checking tools and standard precedents, such as those included in Practical Law, and progress to full customisation of Practical Law or their own documents using questionnaire approaches via Contract Express to collaborate with clients. With these solutions, lawyers can access templates anywhere, any time and can make key gains around speed, accuracy, and efficiency.

Drafting automation solutions enable firms to stop reinventing the wheel, giving them the freedom to be creative for clients. While barriers remain – cost, fear of change, lack of understanding, and lack of engagement – firms need to break through. The question shouldn't be: “Are you using automation technologies?” but “Can you afford not to?” How will you improve the drafting efficiency of your law firm? **LPM**

#### ABOUT THE SPONSOR

Drafting and document automation solutions from **Thomson Reuters** cover the entirety of the drafting process – enabling firms to save time, reduce risk and improve client retention.

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## Day in the life

### JANINE TURNER HEAD OF HR, STEPHENSONS SOLICITORS

The head of HR from a north west firm on days of recruitment strategy and watching the Wigan Warriors



7.00am

My day starts when my alarm goes off at 7am – I'm certainly not one of those early risers. The first part of the morning is pretty much taken up with making sure my two children make it to school – my daughter is in her first year of high school and pretty much gets herself there, but my son is still in primary school. My husband makes me a cup of tea and I usually take something portable like a piece of fruit to eat when I'm in the office. I'm not much of a breakfast person first thing.



9.15am

It takes me 20 minutes to drive from my home in Coppull, between Manchester and Blackpool, to any of Stephenson's Solicitors' offices – and I like listening to Heart FM on the way there. The office opens at 9am, but I've been at the firm for more than 18 years and the leadership is quite happy for me to come in a bit later – which gives me the time to drop my youngest at school. Once I'm in, I'll grab a hot drink, log on to my PC and spend about an hour answering emails – depending on how many new ones I have in my inbox. Then I'll go into a meeting with the HR team to find out what they're up to, give them an update on my projects, and tell them what my priorities are for the coming week.



11.30am

One of the key projects I'm currently working on is introducing a new HR solution into the business. The solution will automate otherwise monotonous HR processes and free up the HR team's time to spend on more important issues. But the challenge is getting everyone ready for the new solution, and a lot of time is being spent currently on preparation, training for the HR team and preparing the data to be transferred over correctly from the old system to the new.



1pm

I sit down to eat a packed tuna pasta salad lunch and then, weather permitting, get out of the office to go for a walk and accumulate some steps on the Fitbit. When I get back, I meet with fee earners to make sure they're adapting to the SRA's CPD changes that came in last November. I run CPD sessions at each of the firm's offices to make sure everyone is happy with the new regime and give our lawyers a forum to discuss any problems they might be having.



3pm

A big challenge for Stephenson's, as it is for almost any law firm of course, is

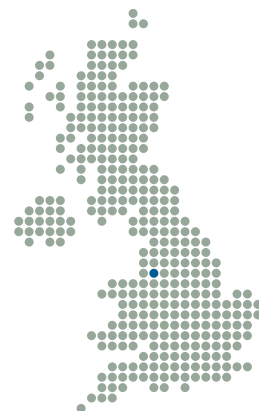
recruitment. I don't handle much of the recruitment side of things but work with the HR team to create a coherent strategy. In the afternoon, we sit down to work on improving our employer brand, which includes talking about how we market ourselves, how we go about that, and how we might get in touch with and attract candidates. We also look at how we maintain the relationship we have with recruiters without being completely reliant on them.



6pm

I prefer getting up late and working late, so though I can leave work at 5.30pm there are normally a few things I want to get done which keeps me going until around 6pm. After work, I'll go with my family to see the Wigan Warriors play rugby league if they have a game on. I've been a huge fan for a long time and I was enormously pleased to see them beat the Cronulla Sharks last February to win the World Club Challenge. My son plays rugby and I can just imagine him playing for the team one day. [LPM](#)

*“I've been a huge fan for a long time and I was pleased to see them beat the Cronulla Sharks to win the World Club Challenge.”*



#### ALL ABOUT

**Janine Turner**

**Lives in Coppull**

**Favourite takeaway: Chinese**

**Dislikes: Canals and narrowboat holidays**