

NOVEMBER 2017

# LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY  
MAGAZINE  
FOR LAW FIRM  
MANAGERS

## BOOK REVIEW

*Aaron and Partners'*  
Mark Briegal reads  
*The Leader's Guide to*  
*Lateral Thinking Skills*

## LAW FIRM PROFILE

*A City Law Firm's  
managing director  
on forming a client-  
centric legal business*



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*Some legal services are more profitable than others. Can SME firms learn what their money makers are to get a bigger piece of the market?*

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# WELCOME

*The market is shifting and becoming more competitive all the time. If firms want to be competitive they need to learn what they're good at and change accordingly.*

If you look back at the totality of law firms, there aren't that many that have developed their legal services offering by scouring the market for opportunities. Most are just products of where they've been – and, as such, where they are at a given moment in time. That's not a bad thing – but as the world shifts so do legal services, and perhaps what were once highly valued can now be produced at the press of a button (supposedly).

I've often had the feeling that many firms are reluctant to take a hard look at their services to determine which are money makers and develop a strategy around that information. But that's exactly what they need to do if they want to be more profitable and competitive businesses. Find out more in this month's feature on p34.

One firm that has leveraged market opportunities well to help develop a more client-friendly brand is A City Law Firm, this month's law firm profile. Read what managing director Karen Holden had to say about maintaining client experience in the city.

Becoming more client-centric might be some firms' saving grace at a time when the high street is steadily declining. Our columnist Jane Pritchard at TV Edwards talks about how the age of the high street may be coming to an end (p19). Elsewhere in the magazine, Frank Saxby at Burgess Mee contemplates stress management (p17), and Peter Carr at Fisher Jones Greenwood sets out his firm's journey to develop the marketing potential of its website using a chatbot (p20).

Our columnists write for us and you purely to add dialogue to SME legal, for which we're hugely grateful.

Patrick Wingrove, editor  
@LPMmag | patrickw@lpmmag.co.uk



*"As the world shifts so do legal services, and perhaps what were once highly valued can now be produced at the press of a button (supposedly)."*

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# About us

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# Contact us



**Rupert Collins-White** is editor-in-chief of LPM magazine. He has written about the legal sector since 2005, before which he endured years as an IT hack until he tunneled out with a plastic fork.  
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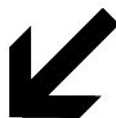
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**Emily Nash** is LPM's client services contact – and resident musician. Want to advertise in LPM magazine or feature in our awesome advertorial section? Then get in touch with her.  
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# IN PRACTICE

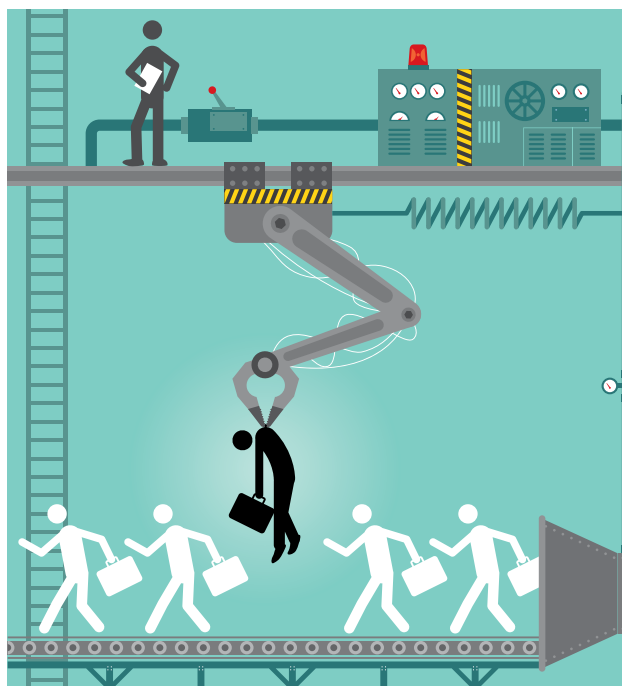
## SNAPSHOT GROWING INNOVATION

There are more solicitors in England and Wales than ever before. It's true – the Solicitors Regulation Authority reported last month that **the number of PC-holders passed 140,000 for the first time, which is 15,000 more than five years ago.** It seems the profession has defied predictions of a potential shakeout, but it hasn't come without warnings that a growth in numbers, particularly for large firms, may be unsustainable in the face of static profits and pressures on fees.

Perhaps some of them have been attracted to the industry by recent stories of innovation in the SME legal market. New-model firm **Riverview Law has become the legal business to offer trainee solicitors a six-month seat in technology services, having been approved to do so by the SRA.** CEO Karl Chapman said the regulator had “adopted a flexible approach that enables us to further educate lawyers in how technology can assist them, our customers and the law generally.” With all these new solicitors coming in, it would be interesting to learn how many of them are taught to be tech-savvy.

Another case of legal innovation has come from a non-legal business. **A new online service that gives family and immigration clients access to lawyers from firms such as Withers and Farrer & Co launched in mid-October – and offers advice from just £4.99.** Founder Tetiana Bersheda, a Ukrainian lawyer based in Geneva, said she wanted LexSnap to help “thousands of people reduce their legal costs in a very substantial way.” Considering the largest accommodation rental business in the world, Airbnb, doesn't rent its own properties, it's not difficult to imagine where this might lead.

It's not just businesses that are currently embracing legal innovation, the government is too – or at least trying, and it will hopefully be a good thing for conveyancers. A decade after



abandoning its last attempt to put the **conveyancing process in England and Wales online, the government is requesting advice on what it should do to accelerate the process.** Let's hope progress here helps the market out of its current slump.

But central government isn't the only authority to call for change recently – or at least approve those calls. **The Legal Services Board has given the green light to legal regulators' plans for price transparency,** almost a year after the Competition and Markets Authority demanded it from law firms.

In other news, **PwC's head of legal Shirley Brookes resigned last month** after four years at the firm. We featured her thoughts on our Your View page last month – I hope it wasn't something we said ... [LPM](#)

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To process a record 140,000 solicitors, the SRA had to resort to mass production methods

### IN NUMBERS

#### Efficiency drivers

Data from LexisNexis's most recent Bellwether Report reveals what fee earners think about their firm's level of efficiency

# 49%



of lawyers consider their firm's efficiency to be 'average'

# 39%



rated their firm's efficiency as 'above average'

Yet

# 81%



of firms spend less than 10% of their revenue on legal tools

Source: LexisNexis Bellwether Report 2017

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**CHRIS ALLEN**  
MANAGING DIRECTOR,  
BLACKS SOLICITORS

CSR is becoming an increasingly important factor for law firms. Calling it a 'critical pillar' may be somewhat overdoing it at present, but people are waking up to the fact that staff want and expect a firm to support good causes. In most cases, people want to assist in that outcome. A firm without a CSR policy runs the risk of giving potential recruits just enough doubt to question the intentions of the owners. Is it really just about them and the profit share per partner? The lack of integrity by certain business leaders in the run up to the recession hasn't been forgotten and working for a firm with a good, beating heart ticks the box for more and more people.



**JONATHAN GILBERT**  
PARTNER, MHHP LAW

As a business we see CSR as vital to sustaining our reputation. We believe giving back to society and other businesses helps us develop positive relationships and foster a positive working environment for our employees. We hold regular pub quizzes to raise money for local and national charities (most recently we donated to the Samaritans). And we aid local businesses through our new-founded networking forum MHHP Business Forum – which will consist of fortnightly meetings starting in October.



*With the importance of corporate social responsibility (CSR) for top 100 firms highlighted by our sister magazine **Briefing** last month, we ask LPM readers:*

*“Does CSR form a critical pillar of strategy for your firm?”*



**BRIAN INKSTER**  
MANAGING PARTNER,  
INKSTERS

CSR has always been a critical pillar of strategy at Inksters. If you are successful in business I believe you should give something back. We have been involved in a number of CSR projects over the years such as building homes in Argentina for Habitat for Humanity and raising funds through charity raffles for the British Heart Foundation. All of these activities undoubtedly brought benefits to the firm as well as those we supported.



**FRANCIS GEORGE**  
MANAGING DIRECTOR,  
FRANCIS GEORGE

As a growing high street firm, being a fully integrated member of the local community is important. We understand that if we support local businesses and people, they will support us in return by either bringing in work or spreading the word about the good work we do. Corporate social responsibility has got to be a pillar of any growing services provider. The people you work for are the foundation upon which you can grow. We try and consider the local community in everything we do, from recycling and food bank collections to legal work for local businesses.



**JONATHAN WHEELER**  
MANAGING PARTNER, BBK

CSR is crucial to our strategy. We spend time and money supporting charities that support our clients and others like them. We are putting something back and demonstrating our commitment to clients' causes at the same time. Fundraising initiatives from marathons to bake sales bring our people together and help them understand and empathise with the challenges our clients face. This can give us the edge when attracting new work or the best people to work for us. Our charitable work marks us out as a firm that cares, and which isn't just interested in the bottom line.



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## Q&amp;A

# Future training

Tricia Chatterton, BPP's Training guru, answers your questions on trainees in the workplace

**Q** There appears to be a mismatch today between the aspirations and the attitudes of trainees and NQs and the qualities firms are looking for. Why is that?

**A** The way legal services are delivered is rapidly changing. Firms are looking to their new recruits to be resilient, agile, technologically savvy, and comfortable with a fast pace of change. The role of a solicitor is also rapidly evolving. Too many youngsters who aspire to a career in law derive their perception of the legal industry from popular TV courtroom dramas, and their understanding of what it is to work in a modern practice is not keeping pace with this evolution. Career progression is also very different nowadays. Many trainees and NQs don't appreciate that firms want to fulfil a more diverse range of roles than previously. It's very frustrating that the SRA hasn't addressed the need for this wider skillset in their proposals for the new Solicitors Qualifying Examination (SQE).

**Q** I keep being told that AI and robot lawyers will take over the work of trainees and NQs. Should I worry about this?

**A** While everyone needs to consider the potential role that AI could have on the sector, machines aren't going to replace lawyers just yet. It's currently estimated that tasks which are automatable range from 13% to 23% of work in a firm, so there will still be plenty of work that needs doing by humans. Patterns of recruitment and the skillsets needed will inevitably be different from those required previously. But technological change brings significant benefits, allowing trainees and NQs to take on more fulfilling work earlier in their careers by automating routine and mundane

tasks. The new routes to qualification, including paralegal and solicitor apprenticeships, give firms more flexibility to hire the right people into the right level roles, rather than having costly graduate trainee solicitors doing the work an apprentice could do at a lower price point.

**Q** We don't hire trainees. What do apprenticeships have to do with my law firm?

**A** Many firms don't hire trainee solicitors because they believe it's too expensive to fund them. Some firms haven't yet embraced apprenticeships because they are uncomfortable with the idea of taking on 18-year-olds fresh from their A-level studies. BPP University Law School has listened to the profession and is currently developing a number of new programmes, including a graduate entry solicitor apprenticeship. This programme will attract apprenticeship funding and ensure that graduates are fit for modern firms. Many firms are not aware that the apprenticeship levy pot is open to all law firms (regardless of size), allowing them to train their own talent with government funding of up to 90% of the cost for small and medium-sized employers with a payroll of less than £3m. This means that training your own pre-qualification graduate talent will no longer be primarily the preserve of large firms. It's also good news for many talented law students who



aspire to practise family or criminal law, for example, but are drawn to the big commercial firms because only they offer funding. With many firms deeply concerned about the consequences of the new SQE proposal on the quality of candidates, training your own talent may be the safest option. [LPM](#)

**Tricia Chatterton is a solicitor (non-practising) and director of legal apprenticeship programmes at BPP University Law School.**

**Send her your questions:**  
[TRICIACHATTERTON@BPP.COM](mailto:TRICIACHATTERTON@BPP.COM)

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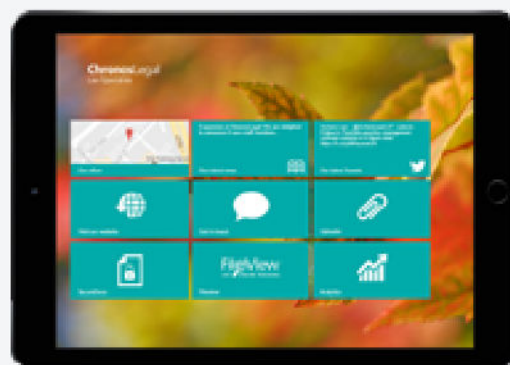
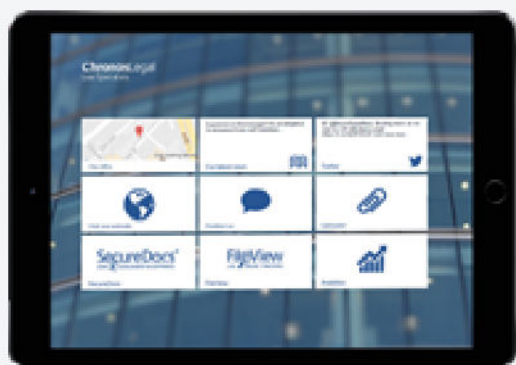
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# AND THE AWARD GOES TO ...



Julie Gingell, director of marketing and business development at SA Law, on her success as a non-lawyer partner and developing an award-winning firm

## Q Why become a chartered marketer?

**A** After an enjoyable career in merchandising for football clubs, I embarked on a career in law. I was keen to be in an environment with more of a learning culture – where I wouldn't stop learning my craft and would be supported and encouraged. Becoming a chartered marketer was part of that itch. Completing my yearly CPD requirements is a key focus for me – I'm continually learning and keeping up with the latest thinking in marketing and in the legal industry. I would encourage anyone working in legal marketing to become a chartered marketer, as it gives you more confidence and credibility when interacting with your lawyer colleagues.

## Q What was the journey to become a non-lawyer partner like?

**A** It was really important for me to become a partner.

When we launched back in 2005, we knew we wanted to embrace all the changes that were happening in the law at the time. We celebrate that diversity of thinking at the boardroom table and our director of finance is also a partner – both of us are non-lawyers. Having non-lawyer partners strengthens the work environment and removes separation of lawyer and staff. But we don't hand partnerships out like sweets here. There's a process, with criteria to be met and interviews to pass. It takes a lot of hard work but everyone is given the chance to get up the professional career ladder.

## Q What's rewarding about your own career?

**A** Being able to progress the careers of people around me. Everyone wants to grow – they're pursuing professional developments, looking at chartered and marketing exams. Trying to expose them

and make them the best possible versions of themselves is very rewarding. The other nice thing about the firm is no one ever feels that they're the finished product – everybody realises there's something new to learn and do. That's the type of work environment I want to foster.

## Q What's innovative about the way your team works?

**A** We work like an internal marketing agency, whereas I know a lot of other legal marketing departments are very driven by the partners and then down through to marketing. It's more balanced for us. There are a lot of ideas that come from my team into the fee-earning departments about what they can do to be more effective and generate more clients. And we get ideas that come back from them. It's this kind of collaborative approach that makes us innovative and successful. We couldn't have done the 'Reluctant Divorcee' blog without working closely with our lawyers. Likewise, everyone on the marketing team can articulate the impact we have on the firm's bottom line and generation of clients.

## Q What's your 'Reluctant Divorcee' marketing campaign and why was it award-winning?

**A** The campaign was born out of wanting a better understanding of who our clients for family law were. The clients we act for have businesses that are similar to ours in terms of culture and style. And I think that we hadn't been focusing enough on the private client side. So we came up with a portrait of our ideal client – how old she was, what she did as a job, where she shopped, etc. We know that getting a divorce is difficult and

emotional enough without having to worry about the divorce process itself.

We constructed a blog that follows a real-life scenario for our fictional character Rebecca Green. It was there to demystify the divorce process – and it has been really well received by our clients and the market. Our peers in the family law community have mentioned that the impact it's had on family lawyers locally is quite interesting, never mind that it's good marketing for us. That's how we knew we were really hitting it on the mark with this one. We were telling a story and not just some soulless advert on a bus – the blog was the best way to portray that. It's been nominated for marketing excellence at the Law Society Awards and has won an award at the Hertfordshire Digital Awards this year.

## Q How should firms best audit themselves to define areas they want to submit for awards?

**A** It's important that business owners or leaders understand what's successful about the firm. Where were the triumphs and marginal gains over the year? When you're in the application process it's nice to take a step back and review. It's also quite good to have a cross-functional team meeting about it. Find a way to create an ongoing dialogue with people across the firm on a regular basis – areas like HR and marketing don't work closely together enough. In an industry where people are products, and people's wellbeing is really important to the smooth running of the firm and the way the business grows, getting a diverse group of people involved in these sort of initiatives is extremely important to the firm. **LPM**

## STEPS TO THE RED CARPET

SA Law's director of marketing, Julie Gingell, gives her tips on how to create an award-winning marketing campaign

- 1 Understand your target audience – both internally and externally. How do your clients think and feel, and how will they react to your campaign? What questions will the senior partner ask about the campaign? Design your internal pitch to answer those questions.
- 2 Any campaign needs to be designed with an element of measurement – why is the firm doing this, what will it get out of the project?
- 3 Messages need to be kept simple. They can't be too convoluted or they may be misinterpreted.
- 4 Add a dash of the unexpected. In our Reluctant Divorcee campaign, people became interested because it was a blog, and they weren't turned off because it was a law firm blog.
- 5 Take influences from other industries. This is important because we aren't judged in comparison to other law firms but to other businesses.
- 6 Mix all of these ingredients together for a balanced approach to the campaign.

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## HR AGONY AUNT

# STAFF ON THE RUN



Polly Jeanneret, LPM's HR guru, answers questions on walking meetings and managing hardcore athletes

**Q** Are 'walking meetings' a good idea?

**A** It's a good start that you know what they are. For those who don't, 'walking meetings' are the latest craze born out of the notion that your bog-standard in-office meeting doesn't actually achieve anything, because no one says what they mean and no one reaches agreement on anything. In the main, utterly pointless. To combat this unproductive facet of our working lives (which also, by the way, leads to chronic sedentarism), Public Health England recommended that we all: "Go out for a walk and get some fresh air for a meeting."

For law firm workers, I can see a few challenges here. Where do you walk? It can be really noisy if you are on the streets of a major conurbation, and, weirdly, often windy (all those skyscrapers creating

tunnels). A flapping tie or a nice hairdo undone are not good looks. Nor can I envisage this working with more than one or two colleagues. Who wants to stroll down the street 10 abreast trying to catch what the person in the middle is saying? It'd look like a politician being mobbed by the media. But having said all that, yes, I do think they are a great idea – not least because it'll help us do our recommended daily 10,000 steps ...

**Q** We have a keen runner in the firm who has recently come back from the 250km Spartathlon, the ultra-marathon. All well and good, but he is absolutely exhausted and it is affecting his performance. How do we curb his enthusiasm?

**A** If he has actually completed the insane Spartathlon race then you are lucky enough to have



one of the most focused and determined employees out there. The Athens-to-Sparta race in Greece, started by a British RAF wing commander in the 1980s, is absolutely mind-boggling. It is completed over 36 hours of non-stop running (yes, NON-STOP running for 36 hours) – some of it up a mountain.

Put these strengths to good use. He will be someone who doesn't easily get phased or stressed by difficult projects, he'll completely get the importance of team work (Spartathlon runners have usually been crew

members for other runners before they do the run themselves) and he will have the stamina to see something through to the end – regardless of how much sleep he has had. He sounds like the perfect candidate for profitable merger and acquisition work. **LPM**

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

**Send her your HR questions: [ASKPOLLY@LPMAG.CO.UK](mailto:ASKPOLLY@LPMAG.CO.UK)**

## THIS MONTH IN NUMBERS

RESEARCH FROM ONLINE BATH PRODUCT PROVIDER SOAP SUPPLIER SUGGESTS THAT BRITAIN AS A NATION SWEARS A LOT AT WORK. HOW DID THE LEGAL INDUSTRY COMPARE TO OTHER SECTORS WHEN IT COMES TO REGULAR OFFICE PROFANITY?

At the lower end of the spectrum

**29%**

of pharma workers swear regularly



Compared with the top end where

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of energy workers swear regularly



And somewhere in the middle

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of legal workers swear regularly



## WASH YOUR MOUTH WITH SOAP!





## BOOK REVIEW

# CRACK OPEN YOUR CREATIVITY

The back cover of *The Leader's Guide to Lateral Thinking Skills* got me excited before I'd even opened the book with the words: "Rocket fuel for the business brain."

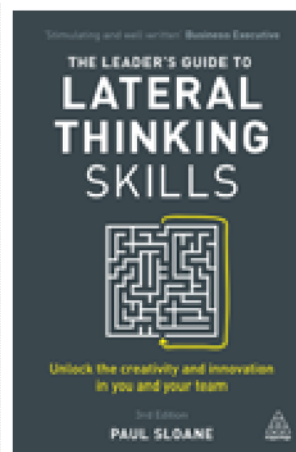
The basic tenet of the book is to help managers unlock the creativity and innovation in their teams, which must be a good idea. It's divided into several very short chapters, each looking at an area of creativity. It starts with some basic reasons why creativity is a good thing (chapter one: The need for innovation), and goes on to explain how to get a team to think laterally and how to implement the creative ideas that this new skill will generate. There's an interesting chapter on common mistakes towards the end of the book (Common mistakes: 12 great ways to crush creativity), followed by a summary and an appendix of tools and techniques.

Paul Sloane uses his book to emphasise the differences between change (moving from one state to another), creativity (the ability to create innovation and introduce something new) and lateral thinking (finding new ways of looking at a problem rather than proceeding by lateral steps). Each of the chapters is short and focused.

My main gripe with the book is that the text is predominantly a series of anecdotes about well-known companies. It's already well known that Apple and Amazon are innovative, that Richard Branson is a creative leader and that low-cost airlines changed the industry by being creative. There's little detail in this book, however, about how they really did it and no real detail about how the leaders either created or changed the mindset of those organisations.

That said, the book is easy to read and quite fun. Each chapter has a little lateral-thinking puzzle, which amused my colleagues and family – some are well known, others were more innovative. They got me thinking and enabled me to realise that we as people can be closed off in our thinking on occasions.

Each chapter has a bullet list of tips for achieving its main concept. Chapter 13 is called Increase the yield, and is about generating more ideas – because coming up with them in greater volume tends to lead to better and more creative ideas. It has a bullet-point list of tips for increasing yield, which mainly points back to the appendix of tools.



**The Leader's Guide to Lateral Thinking Skills:**  
Unlock the Creativity and Innovation in You and Your Team by Paul Sloane

**Publisher:** Kogan Page  
**Publication:** September 2017  
**Price:** £14.99



*Reviewer: Mark Briegal,  
partner at Aaron & Partners*

I'm not convinced that suggesting that simply 'encouraging new ideas', for example, is that helpful. But some of the tools are valuable and the book does encourage the reader to take stock of their organisation, and the links from the issues raised in each chapter to the specific tools are useful in part.

I felt that the most useful part of the book was the appendix – which has 26 A-Z techniques for helping creativity and getting around blocks. Some are well known, such as brainstorming, whereas others were new to me. A particularly interesting exercise I found, called 'pass the parcel', involves handing a piece of paper around a group and having each person come up with a more outrageous solution than the last to a particular problem until someone builds on each idea to create a workable solution. The better-known examples are well presented and there are tips on how to make them work more effectively.

There is nothing particularly new or original in this book, but it pulls together many of the known tools and techniques in a useful way. For a manager looking to generate new ideas, or for someone new to this topic, it is a good starting point. And at £14.99 it's not expensive.

I will keep this book on my shelf and suspect I will use it for ice-breakers in strategy sessions or away days, or when we're struggling to come up with innovative solutions. It would certainly help to unlock creativity then. **LPM**

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LEGAL PRACTICE MANAGEMENT

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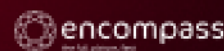
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# STRESSED UP, NOWHERE TO GO

FRANK SAXBY, PRACTICE DIRECTOR

I have seen many intelligent and hardworking lawyers, legal support and essential business-support members gradually become ground down by the stresses of their jobs. But others seem to still be smiling and enjoying (for the most part) the challenges that the 21st-century legal market presents. Why the difference?

Pressures of the changing market, wider economy, the day-to-day running of the firm, cash and profitability, team dynamics, transforming technology and inevitable deadlines can amount to cognitive overload that crashes up and down the firm's hierarchy and demands a great deal of every employee. Lawyers are trained to put the client first and the SRA's principles mandate that everyone acts in the interests of the client. The common factor? It's all about putting someone or something else first.

But I was sitting on a plane listening to the usual inflight safety briefing: "In an emergency, if the oxygen masks are deployed secure your own before helping others," and it dawned on me that putting others first isn't always the best thing to do. We're not in potentially life-or-death moments every day, but putting yourself first is an important lesson and relevant to you and your teams. This is because if you don't look after your own wellbeing, how are you going to help others?

So, what are some of the key differences between those ground down by stress and those who bounce back? From my observations, there are several common characteristics in those who keep coming back for more – other than being gluttons for punishment or just plain crazy.

First, they have an awareness of what is going on around them, the behaviours of others and their own reactions. To be able to manage a situation you must try and understand what is causing it and why. They differentiate between those things they can change and control and those they cannot.

Second, they accept the inevitability of change, have strong problem-solving skills, have great inter-personal skills, and maintain a sense of control. They often have a network of contacts with whom they discuss challenges to gain outside perspectives.

By being aware, accepting change and using problem-solving skills and contacts, they can find better ways to tackle problems and reduce stress. Distinguishing between things they can change and those they can't helps them to think positively, and enables them to direct energy towards the issues they can influence.

Finally, the 'bounce-back' people often make time for learning and personal development as well as for looking after their health and family, friends, rest and recuperation. By doing this they maintain balance between their work and personal lives.

The good news is that I've seen people progress – once they know what to do, these skills and attitudes can be developed and strengthened. It's not set in stone; it's in your hands to look after number one – you. Once you've done that you'll be better prepared to manage, serve and assist those around you. There's no better purpose. **LPM**



*“We're not in potentially life-or-death moments every day, but putting yourself first is an important lesson and relevant to you and your teams.”*

## ABOUT

Frank Saxby  
Practice director  
Burgess Mee Family Law  
[www.burgessmee.com](http://www.burgessmee.com)

**burgess mee**  
FAMILY LAW

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The background of the entire advertisement is a dense, repeating pattern of light blue icons. These icons represent various business and legal concepts, including scales of justice, magnifying glasses, document folders, people silhouettes, keys, and circular seals with the text '40 YEARS'.

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# IS THE HIGH STREET HIGH AND DRY?

JANE PRITCHARD, SYSTEMS AND BD MANAGER



**“** We are not grocers or psychiatrists, but considering what compels us to deliver services on the high street is a useful exercise. **”**

## ABOUT

Jane Pritchard  
Systems and BD manager  
and head of housing and  
community care  
TV Edwards  
[www.tvedwards.com](http://www.tvedwards.com)



**Revenue: £7m**

**Corporate status: LLP**

**100 fee earners,  
130 total staff**

**Offices: London**

Over the past decade, it seems market forces and consumer behaviour driving the high-street presence for commerce has fluctuated considerably. As SME law firms, we must understand the link between general market trends and changes in consumer behaviour. If our clients are no longer shopping on the high street, do they expect to obtain legal services there?

Whether yours is a local, regional or national firm, if we take our lead from retail it's clear that consumer expectations have shifted. In 2016, store closures outstripped openings for the seventh consecutive year – unless you count coffee shops. But that's not all – £1 in every £4 of non-food spending was done online and 896 chain branch stores closed – double the number that shut up shop in 2015.

Banks have had the second biggest fall in high-street presence. Most high-street banks justify their closures by citing changes in consumer behaviour and the requirements of their customers, and meeting those needs with digital apps and improved technology for internet banking.

There have been endeavours in national branding and high-street presence by firms such as Co-op Legal Services and Quality Solicitors. All these efforts have been very much focused on the appeal of being local – “buy your groceries and obtain legal advice.” It emphasises recognisable national branding delivered locally.

But we can't ignore the shift to digital sales and transactions. There may be bespoke services or those sought by vulnerable clients requiring face-to-face human interaction which buck the trend. But even those services aren't entirely safe – the success of online mental health service delivery, such as that provided by Bigwhitewall.com, is a real eye opener.

We are not grocers or psychiatrists, of course, but considering what compels us to deliver services on the high street and whether we deliver more value to clients by doing so is a useful exercise.

In 2010, TV Edwards had gone through eight mergers and had nine offices across London and in Cambridge. This was despite the fact that many of the consultants who moved to work for TV Edwards were situated right across the UK without local high street office presence. In 2017, we took the decision to reduce our presence further and closed all offices apart from two. We created a ‘super hub’ at our head office in Whitechapel, London, which provides savings on a whole heap of infrastructure resources and facilitated improved customer service and best value to all of our clients.

With cloud technology, sound investment in practice management system development and third-party integration in digital advances such as Adobe Sign, the focus is not on asking clients to travel further to us – although they can if they want to – but working for them in delivering specialist expert legal advice in the same way they operate as consumers in the marketplace.

This does not necessarily mean fixed fees or click-of-a-button advice, but it can mean best-value expertise delivered in a convenient collaborative manner. **LPM**

# CHAT'S OUT OF THE BAG

PETER CARR, IT HEAD

Searching a website for relevant content is often a hit or miss affair, yet it's an important function to drive clients through the door. The obligatory search button on the firm's homepage is great at returning pattern-matched results but can't really 'understand' what the visitor is looking for. Consequently, users are usually presented with a list of pages to wade through and quickly lose interest – which could send them to a competitor's website. Google and other search providers can be integrated into the firm's site to provide a more reliable set of results, but the costs involved in that are high and can be difficult to justify.

But firms can provide visitors with a more natural way of finding accurate information quickly, where they simply ask questions through conversation, such as: "I want to sell my house, how much will it cost?" and "I want to make a will, what's involved?" The visitor wouldn't only be understood but provided with relevant information, a quote, or a phone call from a person when necessary. Indeed, chatbot tech enables client engagement to start straight away, and makes the firm's website a more powerful marketing tool.

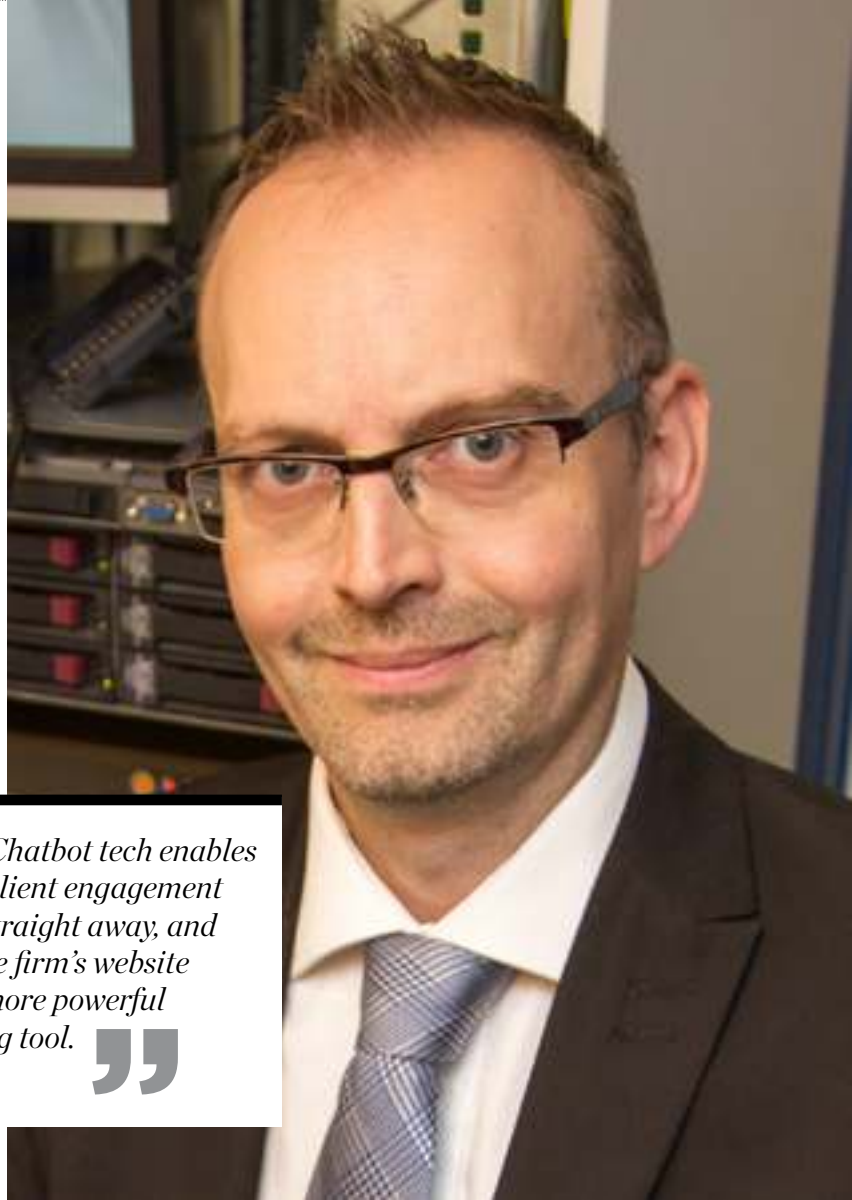
This technology is available to firms – and they should take advantage of it. Fisher Jones Greenwood, for example, has teamed up with a website developer to create such an agent for its website, and thought long and hard about how to present and power a chatbot.

Primarily, the chatbot had to understand natural language – not just words, but the intention of the question being asked. This can't be done using standard website scripting, it needs specialist software behind it – enter artificial intelligence. IBM's AI platform Watson (named after IBM's first CEO) is a world leader in question-and-answer natural language processing, and is available, as all good computer services are these days, as a service. Provide Watson with what you expect it to do, where the resources are that you want it to provide, and a clever bit of integration software and the technical side is done.

The second major consideration we had was whether to make the chatbot so clever that it would pass the 'Turing test' – that is, would people be convinced that they were chatting with a person? The simple answer was, no. We wanted visitors to be fully aware that they were talking to a machine, and that that machine had limits to its knowledge. That said, we didn't want it to be a faceless entity or come across as a cold machine – we wanted it to be more Metal Mickey than HAL 9000. Thus, Alex was born – which has a face and a backstory and designed to be more acceptable to humans.

Alex learns autonomously but is guided by 'teachers'. The teacher reviews conversations and teaches Alex the correct answer when it draws a blank or gets something wrong. The bot knows when it's run out of answers or when the enquiry needs a more personal touch. For example, it identifies when a potential matter is of high worth or of a delicate nature. This is when it hands over to a human. Using the same chat window, the human can review the conversation and advise accordingly. During non-working hours, Alex sends an email to the relevant department with the conversation and assures the visitor someone will contact them the next business day. **LPM**

**“ Chatbot tech enables client engagement to start straight away, and makes the firm's website a much more powerful marketing tool. ”**



## ABOUT

Peter Carr  
IT head  
Fisher Jones Greenwood  
[www.fjg.co.uk](http://www.fjg.co.uk)



**Revenue: £7.3m**

**Corporate status: LLP**

**58 fee earners, 162 total staff**

**Offices: Colchester, Chelmsford, Clacton-on-Sea, Billericay, London**



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LEGAL PRACTICE MANAGEMENT

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# HELP AT HAND

*In the digital age, how do firms know which  
technologies are right for them?*

# DRIVING MIGRATION

Lawrence Lupin, founding director and head of immigration boutique LUPINS, tells LPM how Accesspoint helped transform his business with guidance on new technology and marketing

London-based immigration boutique LUPINS has a core business objective to become the most renowned firm for all aspects of immigration and nationality law. Lawrence Lupin, founding director and head of the firm, says the key to this goal is making legal aid more cost bearing and shifting the business's focus onto private client work.

"At the moment, we're probably better known in human rights and legal aid work. But because of the current economic environment and government cuts to legal aid, we've been trying to make that service more efficient while progressively focusing more on private work – such as acting for investors bringing £2m into the UK, or helping companies obtain sponsor licences to bring their employees over."

He adds that, as part of this future development, the firm needed the best systems in place to help drive efficiencies and deliver an exceptional client service.

"When the firm started 19 years ago we were quite ahead of the game because we had a cutting-edge case management solution. But technology has advanced considerably since then. There are far more products on the market, and we needed someone who could help us work out what would be best for our business."

LUPINS appointed Accesspoint Technologies to advise on and implement an array of new systems to attain competitive advantage in immigration work.

"We needed assistance to get us towards a paper-light office, to enable remote working and introduce video communication systems. As you can imagine, immigration is very paper-heavy and clients often need us to go to them, or to communicate with us

over vast distances, so there were enormous gains to be made by introducing these systems."

But, Lupin adds, an exceptionally important improvement Accesspoint made to his legal business was helping it revolutionise its marketing strategy through its media services offering.

"As our relationship with Accesspoint grew we became more aware of how their team could help us with our brand. After an initial evaluation process, they instigated a full end-to-end strategic review. This highlighted major strengths and opportunities that we could build on while questioning our weaknesses. The results forced a collective management agreement about our long-term vision for the future, which resulted in a rebrand – including changing the name of the firm and launching a new website." He adds that, as a result, the firm has considerably improved its presence within the business immigration services market.

## WHAT DO WE NEED?

Lupin says the firm had complex requirements for any new system it chose to invest in, and it would have been difficult to find one without Accesspoint's guidance.

"First of all, we needed something that would help us improve our legal aid delivery. It was important to be able to collect and analyse time reports to work out who was doing what and whether we had the right people doing the right things at the right time." He adds that it's vital for a legal aid firm to organise its time, and Accesspoint was capable of understanding that need and finding a solution that would deliver.

But, he adds, the firm also needed a system to enable flexible working.

## ABOUT THE SPONSOR

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

[www.theaccesspoint.co.uk](http://www.theaccesspoint.co.uk)







“Our lawyers spend a lot of time on the move. For example, we recently got a call from a client who was about to be removed. We had to rush to the detention centre and liaise with UK Visas and Immigration to prevent that from happening. It can be the case where clients just can’t make it to the office and we have to go see them.” He adds that having remote working systems enables fee earners to be productive away from the office – which drives efficiencies by making use of what was previously considered ‘down time’.

Lupin says that Accesspoint also helped them find a system that offered a fully integrated document management and production system.

“We wanted one comprehensive system rather than several and the great thing about the solution Accesspoint found for us is that it can be integrated with numerous third-party solutions – and they only charge you for what you use.

“One integration was a document search solution

“*Lawyers can now find any of the documents relating to a matter remotely and quickly – which is important when they have to rush to a client.*”

that’s helped us cut down our paper usage and made documents and content far more searchable. Lawyers can now find any of the documents relating to a matter remotely and quickly – which is important when they have to rush to a client.” He adds that the system also enables the firm to easily send documents to clients stationed overseas for review, which saves considerable time and money.

“All of our private work is now completely paperless



and that's really helped us stand out as a top provider in that market."

### SYSTEM MIGRATION

More important than finding the right systems, says Lupin, the firm needed a partner to help it integrate new solutions into the business.

"You can have the greatest systems in the world, but if they're not implemented properly then they're not going to be of any use to you. And that's where Accesspoint really make a difference." He adds that the firm had a key internal manager to see the project through, but Accesspoint "filled in the gaps" and were integral to the project management process.

"They helped us enormously with the back-office side of getting systems in place. They had a lot of experience with implementation in other firms – including other legal aid firms that had specific requirements – and everything went smoothly."

Perhaps the key benefit of having Accesspoint manage the system migration was getting employees trained and used to new solutions. Lupin says: "Accesspoint provided a lot of intensive training before the systems went live. But they've provided it on an ongoing basis and developed systems stage by stage."

He adds that this process was also crucial for effective change management, since people as a rule are often resistant to reform. "I remember years ago when we went from manually writing notes to doing

**“You can have the greatest systems in the world, but if they’re not implemented properly then they’re not going to be of any use to you. That’s where Accesspoint really make a difference.”**

that on a computer, and lots of people just didn't want to do it. But by having Accesspoint teach everyone how to use the systems and helping management drill in the idea that change was happening, the transformation process was much smoother."

### MARKETING MAGIC

A key challenge the firm faced despite its new systems was developing a stronger presence within the private immigration law market. Lupin says: "Legal aid isn't very well paid nor is it good for cash flow, as interim billing is severely restricted. Private work, on the other hand, is more lucrative and puts the firm back in control of its finances."

"Of course, we had developed our private client offering using our new systems but we needed to get the word out about our new and improved service to attract more clients." He adds that the first step to achieving that aim was to completely revamp their website, which was project managed by Accesspoint.



"They built a whole new website from scratch and handled imaging, rebranding, content and subsequent SEO and strategic marketing. They had suggestions about what should go on the homepage, how we should approach publishing testimonies, and the way the site should be structured." He adds that in the digital age a website is a business's first point of contact – and if the firm wanted to attract new private clients it was important to make a good impression.

"Lots of our potential clients are based overseas and the website is the only reference they have for the firm. And if the site's outdated and filled with information that's four years old and doesn't tell anything about you, it's not going to attract them."

Lupin says the website relaunch was also a good opportunity for the firm to rebrand itself as a modern business focused on high-quality immigration services.

"Your brand is equally important for communicating who you are as a business. We're a firm of 30-plus people, not just me working by myself, and specialise in immigration – so we changed the name of the firm from Lupins Solicitors to LUPINS Immigration to reflect that."

The firm has seen a considerable improvement to the quality of its enquiries since launching its new website. Lupin says: "We now have a lot more traction on Google searches for immigration law and far more serious inquiries that end up converted into sales."

"With Accesspoint's help we've also revolutionised our lead conversion process. We have senior people who handle inquiry calls and monitor our conversion rates and analyse how we can improve the process."

## FUTURE DEVELOPMENTS

Lupin says the firm has made enormous progress in improving its legal service offering and breaking into

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**“** *The people at Accesspoint are almost like mentors and they've really helped revolutionise the way we work, think and portray ourselves in the marketplace.* **”**

business and private immigration to become the most renowned immigration firm, but there's more that it and Accesspoint can accomplish together.

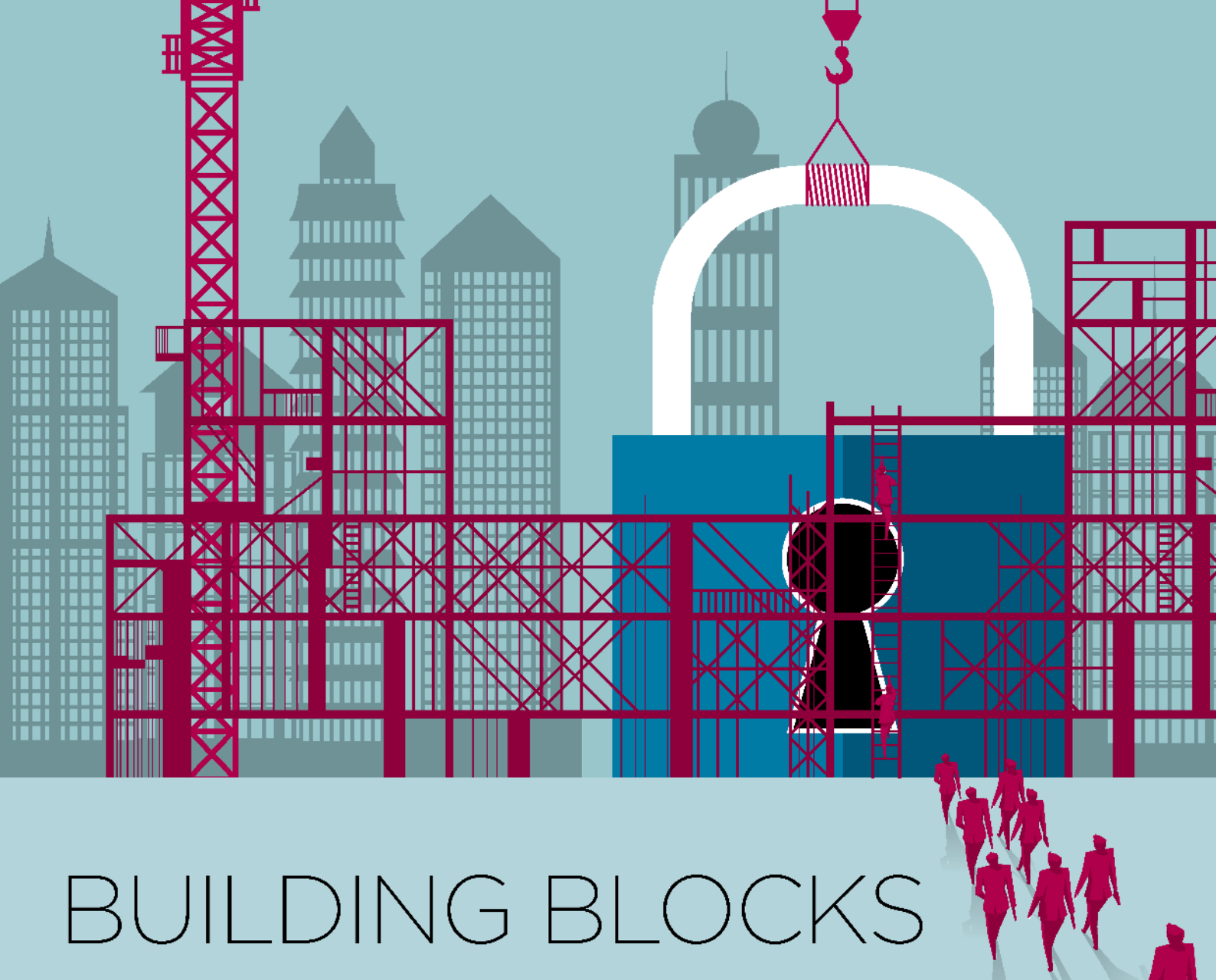
"Plans with Accesspoint involve much of the same kind of improvements. We want to develop our software and the IT system itself, and in terms of marketing do more social media work on Facebook, LinkedIn and Twitter." He adds that the firm is also exploring the possibility of implementing a digital dictation solution.

"That might be the next step forward for us in terms of driving efficiencies and improving our service – but we're still very much in the exploration phase with Accesspoint at the moment."

And, he adds, the firm will likely seek to develop a stronger relationship with Accesspoint in the future. "Having Accesspoint on hand is like having a whole bank of knowledge and expertise at your disposal. It gives us access to resources that, as a small firm, we simply wouldn't have been able to afford otherwise."

"And we've learned an enormous amount from them. The people at Accesspoint are almost like mentors and they've really helped revolutionise the way we work, think, and portray ourselves in the marketplace."

Change is important for firms to stay competitive in a constantly changing market place. But in a world where technology is rapidly evolving, it can be difficult to know which systems are right for the business and how to implement them properly. Using technology to develop services is only half the battle to attaining competitive advantage – the other half is sending out the right message and communicating the added value of those services. Lupin says that having Accesspoint on hand to help them through this major transition was invaluable, and helped them to effectively achieve their aims. **LPM**



# BUILDING BLOCKS



Gary Shaw, commercial director at Accesspoint, sets out the future challenges of data protection and how firms can build around GDPR compliance

As we are perhaps all now aware, we all need to comply with the EU's new data protection regulations by May 2018. For many law firms, GDPR doesn't necessarily mean General Data Protection Regulation but rather it means 'absolute panic' and 'extreme caution' – since it likely adds more work to already hectic daily schedules.

Perhaps it's the notion that legal businesses don't fully understand what's required from the new data rules and yet are seen by most of the populace as potentially knowledgeable of the matter that's increasing the pressure on them to do more about it. Firms may be worried that they could become an early GDPR offender or 'victim' and that that will destroy much of their credibility.

Many firms see the GDPR as primarily an IT issue, but that's just not the case. It's important to understand that it's more about the core of your business's working processes and the systems and policies. Common sense prevails here and, in some ways, should drive thinking about compliance with the GDPR.

When asking the question: "Where is the biggest

challenge for you?" the more obvious areas where data should be protected seem to get no mention – and it would appear that the biggest concern and impact could be harvesting itself in the smaller and more detailed areas of people operations and their data handling.

Many of these areas are being buried behind systems that we have created and implemented over the years and have taken for granted, or 'situations' that we have encountered and sometimes adopted over the years that we haven't really fully considered until now.

The need for the GDPR to be viewed as mechanic is long overdue – taking more time to agree and issue than first conceived by the European Commission back in 2012. The regulation was then agreed upon by the European Parliament and Council in December 2016. Without doubt it has now focused minds and attention into everyday business activities previously accepted and sometimes overlooked despite the occasional slip up.

Policing our compliance and managing the enforcement of the GDPR will take time and it could prove to be very difficult on both counts at authority



and ground level, when considering the magnitude of everyday operational activities. The one thing for sure is it will have a big impact on what we do and on the thought process around how we do it.

The whole issue around data and how we collect, protect, store and select it for use is under scrutiny. New obligations from the GDPR on such matters as data subject consent, data anonymisation, breach notification, trans-border data transfers, and appointment of data protection officers, to name a few, may require companies handling EU citizens' data to undertake major operational reviews and possible reform if deemed fit to pass new regulations.

The GDPR will offer more guidance on appropriate security standards while imposing strict obligations on nominated data processors and controllers with regard to data security. The GDPR will also introduce, for the first time, specific breach notification guidelines.

Under the GDPR, a personal data breach is considered a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, stored or otherwise processed. One must provide notice without undue delay and where feasible not later than 72 hours after having become aware of the breach. This is the start of self-policing, and further ensuring our willingness to comply are the financial penalties that can be very substantial – in some cases up to £20m, which could be fatal to business continuity. Such fines add pressure for us to sit up and take notice.

Data controllers and processors alike must designate a data protection officer to comply with the new regulations.

Among some of the credentials required of data protection officers is expert knowledge of data protection law and practices. The GDPR's recitals suggest the level of expert knowledge should be determined in accordance with the data processing operations carried out and the protection required for the personal data processed by the controller or the processor. Without stating the obvious, much of this will also be just good old common sense with how we think and handle situations.

Responsibilities include: informing and advising the controller or processor and its

employees of its obligations to comply with the GDPR and other data protection laws, and monitoring compliance with the GDPR and other data protection laws, including managing internal data protection activities, training data processing staff, and conducting internal audits. But they will also need to advise with regard to data protection impact assessments when required, work and co-operate with the controller's or processor's designated supervisory authority, and serve as the contact point for the supervisory authority on issues relating to the processing of personal data. And they will have to be available for inquiries from data subjects on issues relating to data protection practices, withdrawal of consent, the right to be forgotten, and related rights.

These responsibilities will mirror those used elsewhere from around the globe. Data protection officers have many rights in addition to their responsibilities. They may insist upon company resources to fulfill their job functions and for their own ongoing training. They must also have access to the company's data processing personnel and operations, significant independence in the performance of their roles, and a direct reporting line to the highest management level of the company. Job security is also included – the GDPR expressly prevents dismissal or penalty of the data protection officer for performance of their tasks and places no limitation on the length of this tenure.

All of this said, most businesses have been around for a considerable amount of time – during which their everyday processes and systems have been developed with thought and care to execute the best possible solution to a problem or enable better productivity. With this in mind, it begs the question regarding GDPR: just how much do we all really need to do? **LPM**

**“For many law firms, GDPR doesn't necessarily mean General Data Protection Regulation but rather ‘absolute panic’ and ‘extreme caution’.”**

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# HYBRID SILVER LININGS

NICK HAYNE, CLOUD EXPERT

The corporate environment continues to be affected by revolutionary changes in technology — and legal is no different. Cloud is one of those trends that continues to influence businesses. It has undergone significant changes since it first appeared on the scene and has overcome significant barriers (mostly around cost and security). Confidence levels in cloud are at an all-time high.

It's true that the legal sector — along with other heavily regulated industries — has been a slower adopter of the cloud. But its benefits are being realised and it's adding significant value to legal practices — from email hosting and enabling remote working, to storage and disaster recovery.

This is particularly true of hybrid cloud. Hybrid cloud is a combination of private and public cloud services, where one or several touch points exist between the environments.

The hybrid cloud model is especially beneficial to the legal industry, where not everything can be hosted in a public cloud environment due to compliance or regulatory requirements. As a result, legal firms can use both private (getting the enhanced security and compliance benefits) and public cloud (getting the cost and scalability benefits). It is, for many, the best of both worlds and offers a unified, automated, and well-managed computing environment for legal firms. The move to hybrid environments is understandable, as many businesses simply can't get past the issue of data governance and security when using a public cloud. Stricter data policies, such as the EU's upcoming General Data Protection Regulation, mean legal firms need to securely manage the lifecycle of personal data they hold.

From a security-focused perspective, certain hybrid cloud solutions also allow businesses to benefit from continuous compliance. Instead of having regular checks to ensure you're meeting the standards set by various accreditations, certain service providers can deliver continuous compliance that is designed to meet service requirements. This includes comprehensive coverage and a 24/7/365 incident reaction and management capability, which makes it easier to be FCA, PCI-DSS and ISO27001 compliant.

Overall, hybrid cloud gives businesses the ability to leverage existing infrastructure, optimise their use of technology, gain more flexibility and agility, have greater control over shadow IT, and enhance predictability in terms of performance and billing. Of course, hybrid cloud isn't the end of the journey but another stage of it.

With the recent launch of Microsoft Azure Stack, this evolution is taken further. Azure Stack is a hybrid cloud platform that provides organisations with a seamless, single development and delivery platform. Services can be developed in public Azure and seamlessly moved over to Azure Stack — saving time, expense and making operations more consistent. Azure Stack is ideal for firms as it benefits from the scalability that Azure (public) provides, but in a private, certified, highly secure environment, allowing firms to store sensitive data.

It is worth mentioning that any migration to the cloud or adoption of new services shouldn't be seen as a panacea. Arguably this is where working with a partner will yield the most value, ensuring the chosen solution is fit for purpose, whether that is true hybrid cloud or a combination. **LPM**

**“** The corporate environment continues to be affected by revolutionary changes in technology — and legal is no different. Cloud is one of those trends that continues to influence businesses. **”**

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# ALL CHANGE

DAVID GREEN, THE STRATEGIST



“Often the most significant barrier to change is not the willingness of owners or managers, but of staff.”

Change is constant and evolution can be the difference between profit and loss. This change can be voluntary or forced and involve any aspect of a firm – whether financial, regulatory, technological or operational. A business that's not prepared to change will soon fall behind its competitors that are willing to adapt.

But businesses that want to embrace change must approach it in the correct manner. Often the most significant barrier to change is not the willingness of the owners or managers, but the staff. Obtaining buy-in from staff will significantly influence the success or failure of any change.

When change is discussed it's often considered to be for negative reasons – for example, the business has hit troubled times financially and needs to reduce expenses, or technological advancement results in necessary job losses.

But even a positive reason for driving change can be a disruptive influence if managed badly. So, how do you address the challenges staff can pose during an uncertain time?

Once the need for transformation has been recognised by the leadership, it's imperative that staff are consulted. They will probably already be aware of the changes – whether because industry-wide news is discussing a change to the market or rumours have started. The sooner a business can talk to its staff the quicker they will buy into it. Whether the change is positive or negative, most employees will respect the leadership for taking action and for discussing it directly with them.

Make sure you take the time to understand the

concerns of staff. If you accept any of the points identified as causing concern you can respond to them. Not every issue can be overcome, but you can aid understanding of why that's the case.

Where you can adapt, do so. Listen to the ideas and suggestions of your staff and be prepared to change your own views and plans accordingly. Staff are often much closer to service delivery and clients and as such their views are valuable.

Where there is an impact on jobs, particularly losses, ensure your message is clear and consistent so you don't lose key people through a period of uncertainty. Also, don't rush change – ensure your plan is clear and those involved are aware of the time frame for delivery. Set milestones against which progress can be measured.

Once the change is about to be implemented take stock of where you have arrived and of information gathered along the journey. This will be the last time you can make adjustments. Consult your key team, review what you set out to achieve and see if final amendments are needed.

If your preparations have been thorough, the implementation stage should be the easiest part. But for change to be successful, it must be thought out, discussed and implemented.

Change does not stop when the business has delivered its new way of working – ongoing monitoring is essential because the business needs to know if targets have been hit and goals met. If not, managers should be asking: "Why? Do we need to change again?"

It may help to have an impartial, outsider view of the change – staff may respond better to external expertise on such matters. **LPM**

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## A City Law Firm CX and the city

Karen Holden, managing director of A City Law Firm, speaks to Patrick Wingrove about establishing a City practice that puts client experience first.

Many law firms are more concerned with their bottom lines than adding value to services or fostering better consumer satisfaction. The problem with that business mentality, of course, is that it alienates clients who are increasingly willing, and have the right tools at their disposal, to scour the market for a more client-friendly service.

And perhaps the greatest perpetrators of this attitude to legal services delivery are large City of London firms. Karen Holden, managing director and founder of City-based A City Law Firm, says she worked as a solicitor for a big London-based firm but left because of a lack of focus on clients.

"I found working there demoralising because it was just about money and how to get more out of the client by dragging out litigation. But more than that, practising the law had lost its warmth. For example, lawyers wouldn't meet the client – the partner would conduct a client meet-and-greet and the fee earners would do the work in the background – and so the personal touch and empathy elements had been lost."

Holden adds that she wanted to work in a firm where solicitors would be encouraged to think outside the box and add value to services. She soon realised there was a gap in the market for a practice that could offer a high-quality, personal service to City clients at competitive rates, and set up A City Law Firm to fill it.

"I started the firm in 2008 – it was one of the hardest things I've ever done but I would never go back and change it. We had some tough years, particularly during the

From left to right: John Day, head of client relations; Karen Holden, managing director; Trevor Holden, practice manager; Andrew Spearman, director; Bianca Martin, head of family.



## LPM FIRM FACTS

**A City Law Firm****Revenue: Over £750,000****Corporate status: Limited company****Eight fee earners, 13 total staff****Offices: London****Specialisms: LGBT, surrogacy, startup to scale-up/getting investment ready**

recession, but it was worth it.”

The first element of the firm that makes it stand out from larger City firms is its client management structure. Rather than having client relationships maintained by a specific partner, the firm ensures that they are looked after by a client management team. Holden says: “We wanted to ensure that when clients phone they don’t reach a receptionist but one of a team of junior and senior lawyers and an assigned client manager who can answer queries, give quotes and book meetings straight away and who know the client.

“That teams would have been introduced to the client so they will know their name and the details of their case. Client engagement is very important and we never want a situation where no one’s available to speak to them.” She adds that the firm also tries to engage clients in other ways, such as inviting them to conferences and seminars.

“We host several events a year and offer free tickets to our clients. It’s important that they get to know about all the areas we’re working on and the services we can offer them, including non-legal advice such as where to find an accountant who will be the right fit for them.” Holden adds that the firm has also started producing webinars to cater to overseas clients who might not be able to make physical events.

The firm is also working on bringing in new technology that will give clients greater access to their lawyers. Holden says that because the firm does LGBT, surrogacy and tech startup work, its clients are spread out through the country.

“We wanted to make sure that all of our clients could have face-to-face contact with their lawyers, so we’ve teamed up with a company called 121With to provide video conferencing.

“It’s great for introducing ourselves to potential clients because they can call us and meet face-to-face to discuss their needs and work out if we’re the right fit

for them without incurring the costs of coming to London.”

Another way the firm fosters its client service is by offering fixed fees for most of its services. Holden says this is because price transparency and certainty are as important to the client experience as effective communications.

“We will offer a fixed or capped fee on everything except litigation, which is not easily quantifiable, so there are no hidden charges and no sudden invoices hitting clients out of the blue – which makes it easier for them budget.

“We also try to be very upfront with

clients that we’re not the cheapest option because we’re not a high-street firm, but that we’re cheaper than big City firms and can offer a more valuable service.” She adds that the firm also tries to be innovative with its pricing structures to give clients greater agility when it comes to paying for services.

“We have several pricing packages for consumers to choose from. For example, our premium package is charged monthly and includes a free hour of email, phone and meeting contact with a lawyer a month. This not only provides price transparency but gives clients the option to pay for services over a year rather than all at once.”

But providing a superb client experience, according to Holden, was as much about fostering a positive and caring culture among staff. She says that professionals who are treated with care and respect and not just as ‘money rakes’ are more inclined to provide the best possible service to the firm’s clients.

“In my previous role in a large firm I remember one woman announcing that she was having a baby and everyone acted like she had died. I wanted to start a firm that would make it easier for people to maintain a work-life balance – including expecting or current parents.

“A big part of maintaining this culture is bringing in the right people. It’s very important to me that ego and the big-city culture don’t make their way into the business. When we bring someone on we make it clear that there’s no hierarchy here – we work together and graft as a team.” She adds that maintaining a happy culture is a key selling point for the firm because clients enjoy working with happy and well looked-after staff.

“We’re not like your typical large City firm – we’re focused on the client experience which means giving them what they need and giving staff what they need to provide a great service. **LPM**

“We’re not like your typical large City firm – we’re focused on the client experience which means giving them what they need and giving staff what they need to provide a great service.”



## HOT TOPICS

This feature kicks off a series of law-firm-area analysis articles – covering the most profitable or potentially lucrative services firms can practise. From corporate and commercial to wills and probate, we will get under the skin of the legal industry's hot topics.

# FUNDING THE FUTURE

Brexit and changing regulations are making the legal market more competitive and uncertain. What kind of firm practice areas or work types will fund firms' future top and bottom lines and how do they find them?

It's been more than a year since the EU referendum – which might beg the question, is the UK heading inexorably towards a post-Brexit recession as predicted by some? The simple answer is, we still don't know – but it's certainly a possibility. London Stock Exchange chief executive Xavier Rolet recently said Brexit could trigger the next financial crisis if France and Germany try to demolish London's status as the centre of a global economy. But even if that's not the case, SME firms could be in for a tough few years. The market is becoming increasingly competitive and the SRA's plans to deregulate unreserved work will likely make it more so by enabling new entrants to deliver services at a lower price – and thus eat their law firm competitors' breakfast, lunch and dinner.

If firms want to keep some food on the table, they should consider which of their legal services are bringing home the bacon – whether that be because they're highly valued, offer a consistent stream of work, or can be delivered in a way that makes them profitable – and then work out what to do with that information.

Richard Clark, COO at Manchester firm CFG Law and former banking professional, says that successful businesses, legal or otherwise, are those that know where they're profitable and run their business plans to ensure that profitability continues – which includes butressing or shedding services as needed.

"Take General Electric as an example. Former CEO and chair Jack Welch determined that he wanted to be in particular markets because he could make profit from them and divested anything that didn't make the returns you'd expect." He adds that it might not be as simple for firms that have other reasons for practising certain areas of the law, such as a commitment to

access to justice – but the principle holds.

But perhaps more important than identifying current 'bacon bringers' is finding out which services will be profitable or unprofitable in the future. Malcolm Higham, finance director at Warwickshire firm Wright Hassall, says this may be tricky because it's very difficult to predict trends in the market – but firms that don't at least explore their options are missing a trick.

"As a non-legal example: if you could have predicted 15 years ago the increase in the number of health and safety requirements that were going to grow across the EU and UK and been the first mover providing corporate enterprises with accreditations and solutions, you could have made a lot of money out of that."

It's not too difficult to see how firms might do something similar if they could find a way to explore their options or better read the market.

## SHOW ME THE PROFIT

Most firms have a portfolio of services, either over multiple disciplines or in one sector – the challenge is working out which are profitable. Higham at Wright Hassall says that to achieve this goal, firms must enable their finance team to undertake a detailed analysis of profitability to matter level, by department sector or case type.

"One of the things we've started to do is look much more at gross margin contributions to understand which areas of the business have higher returns. So, we measure gross margins for each team and set them as a KPI for our future business plans.

"We recently took 20,000 completed matters from the last two years, did some simple algorithms, decided how to allocate secretarial costs across fee earners' hours, and came up with the cost of delivering those matters and worked



out theoretical margins.” He adds that this analysis helped the firm identify corporate, commercial and dispute resolution work as its strongest areas – perhaps because those services are largely one-offs which involve greater risk and therefore a success fee.

Scott Milne, joint managing partner at east Scotland firm Thorntons, agrees that such analysis is vital for firms that want to develop a successful business strategy.

“We’ve got a very good internal financial management function which can tell us the margin on every single piece of work we complete. That information helps us shape the business by informing what areas we want to be

in and which we want to minimise our exposure to.” He adds that broadly the firm’s private client work is the most lucrative.

#### TURN THE VOLUME UP

Both Thorntons and Wright Hassall identified higher value transactions for better-off clients, both corporate and private, as their highest returning areas – which in principle often produce high profitability. But law firm ‘bacon bringers’ can also be more commoditised high-volume services. Paula Fowler, managing partner at Essex firm Fisher Jones Greenwood, says one of her firm’s strongest areas is family law.

“There are certainties in life such as death and

**“The good thing about large-volume contracts is people tend to sign up for several years and they offer a large, predictable amount of work coming in regularly.”**

Adrian Jaggard, managing partner, Taylor Rose TTKW

divorce, and so family and private client work makes up a big part of what we do. It's also fairly recession proof and provides a consistent stream of revenue coming into the business.”

Similarly Adrian Jaggard, managing partner at national firm Taylor Rose TTKW, says his firm thrives on high-volume repeat work. “Our most successful areas are large-volume contracts for businesses and high-volume work such as injury or conveyancing.

“The good thing about large-volume contracts is people tend to sign up for several years and they offer a large, predictable amount of work coming in regularly.”

A firm's most profitable services may also be dictated by location – if it has access to a natural client base that does or doesn't do certain things with legal implications. Fowler says her firm's commercial work is very profitable, but that its returns have as much to do with the firm's physical location as the nature of the work.

“All our offices are based in growing and thriving commercial areas, which likely accounts for our growth in commercial and corporate law.”

Of course, niche work can also be quite profitable since competition tends to be lower and the firm can leverage its reputation as an expert in that field. Karen Holden, managing director at City-based A City Law Firm, says one of her firm's strongest areas is surrogacy, because few businesses do it and it tends to be one-off type work where clients look for experts.

## BOTTOM LINE MAGIC

But can firms know which their most profitable or potentially profitable areas are purely by relying on their financial function? It seems the answer is ‘no’. Stephen Mayson, honorary professor of law at University College London and chair of Bristol-based DAS Law, says that the profitability of an area may depend on a firm's ability to operate it and make money. “You can take some aspects of practice which, on the face of it, are not highly profitable, but delivered with the right people and right technology and in the right way can be incredibly profitable.” He adds that people are often surprised to learn that the highest-earning lawyers are often those in small

firms that have leveraged human or technological capital in some way.

Clark at CFG agrees with Mayson, and adds that personal injury could be highly profitable, despite proposed government reforms to raise the small claims limit and introduce a whiplash tariff, if it's done in the right way.

“Some of my peers might be shocked by the idea that firms could still make money from PI despite reforms to the sector. But it is quite profitable as long as the firm can sustain high volumes of transactions and complete them at a fast rate using the right technology and people at each stage of the service.”

Higham at Wright Hassall says that similarly debt recovery work can generate good returns for his firm because of its high level of automation. “Debt recovery is low-value, high-volume work which might be expected to generate low margins. But processed with the right tech and people, it can be a good addition to the business.”

## SIZZLING STRATEGIES

Armed with the information of what is and isn't profitable, firms have numerous strategic paths they can follow. But, as Mayson at UCL points out, firms are often held back from forming an effective strategy.

“Most of them are products of where they came from and where they are at any given moment in time. Their ability to move significantly is often quite limited.”

Clark at CFG agrees that the greatest challenge for law firm leaders is identifying what the firm is good at, but doing so is essential if they want to be competitive.

“Only when you understand what you are good at can you possibly focus. The issue of course is being able to shape and exploit what you excel at – that requires leadership and a strong commercial focus.

“The danger for firms that don't strategise based on profitability is that they will continue to provide a toxic mix in a declining market.”

He adds that a straightforward strategy is to increase investment in highly profitable areas and reduce it in the less profitable – or get rid of them altogether.

“If an average firm were to chart its profits by work type or clients over a 12-month period it would likely see a bell curve, because certain areas will inevitably be more profitable than others. Firms should realise that those profitable types are subsidising the less profitable and they have to decide whether they want to be in those less profitable types.”

Of course, there may be profit-led reasons for holding on to unprofitable work. Clark says: “It may be the case that those areas bring in clients

## FIRM FACTS

### Taylor Rose TTKW

**Revenue: £10.3m**

**Corporate status: Limited company**

**69 fee earners, 250 total staff**

**Offices: Workington Northampton, London Peterborough, Manchester**

### CFG Law

**Revenue: £4.5m**

**Corporate status: Limited company**

**46 fee earners, 75 total staff**

**Offices: Stockport, Cheadle**

### Capital Law

**Revenue: £9.2m**

**Corporate status: LLP**

**76 fee earners, 120 total staff**

**Offices: London, Cardiff**

### A City Law Firm

**Revenue: Over £750,000**

**Corporate status: Limited company**

**Eight fee earners, 13 total staff**

**Offices: London**





who use more profitable services. Firms need to ask: 'Do I need to do this work to make my clients happy?' and 'Can I justify the profit decline in these areas because it gets cases over here?'"

Duncan Macintosh, senior partner at Cardiff commercial boutique Capital Law, agrees with Clark, and adds that in most circumstances where an area was haemorrhaging money, firms could justify shedding a service, but the risk of losing profitable clients would have to be a factor.

"There's more to the business's success than a strict profit review of specific areas of work. It's also about ensuring that the clients we value receive advice in the areas they value. So, for long-term success, we will provide advice across a range of commercial areas so long as clients want it, even if some areas are less profitable."

Milne at Thorntons adds that it's also important to analyse how recession proof the firm's offering is when analysing its offering.

"We offer both private client and commercial work because it creates a fairly robust model that's resistant to economic downturn. Having that mix provides significant returns in times of prosperity and provides a buffer for losses made in areas affected by downturn during recession."

And, of course, there's also the future consideration of unreserved work being deregulated. Mayson says if a firm was in a situation where its most profitable offerings were unreserved, it might consider shedding other activities to become deregulated and reduce compliance costs.

"There are some areas of law that can be very profitable, such as will writing, that are unreserved and could be much more profitable without compliance costs. One the other hand,

being regulated in those areas might attract clients – and firms must consider that they need to offer a reserved activity to run as an ABS."

## FUTURE FANCIES

Legal management leaders might also want to look at work types that aren't profitable now but might be in the future. Higham at Wright Hassall says that as well as a good finance function, successful businesses harness their entrepreneurial know-how to predict the source of future profits.

"Of course, it's generally very difficult to predict changes in the market. One indicator might be legislative reform, which temporarily throw up opportunities. Data protection for clients who want to become compliant with the EU's General Data Protection Regulation is a good example right now."

Evolving technologies might also give firms an idea of new and profitable areas to start investing in. As Richard Watson, futurist at Imperial College London, pointed out at 2017's LPM conference, driverless cars may introduce a need for legal guidance for ethical programming in the near future. Macintosh at Capital adds that his firm is currently looking at intelligent systems and how they may change the way their work is done.

"We're currently working with a university in Wales to understand what intelligent systems might look like in law in five or 10 years. It's currently a hot topic in legal, and we want to understand what those systems are capable of – and whether it should be a hot topic, or not."

Whether recession is on its way or not, law firms need to know what makes the big money if they want to be successful businesses. High-value one-off transactions for commercial or private clients inevitably bring high returns, but high volume work or niche work such as personal injury or surrogacy can also bring home the bacon – as long as the clients are there and the service element is done right. Ultimately, firms need to know what they're good at and what clients want when developing an internal investment strategy – and if they can work out what clients might want in the future there's even more money to be had. **LPM**

## FIRM FACTS

### Wright Hassall

**Revenue: £19.3m**

**Corporate status: LLP**

**200 fee earners,  
300 total staff**

**Offices: Leamington Spa**

### Thorntons

**Revenue: £22.8m**

**Corporate status: LLP**

**183 fee earners,  
382 total staff**

**Offices: Anstruther,  
Edinburgh, Perth, Arbroath,  
Forfar, St Andrews, Cupar,  
Kirkcaldy, Dundee, Montrose**

### Fisher Jones Greenwood

**Revenue: £7.3m**

**Corporate status: LLP**

**58 fee earners,  
162 total staff**

**Offices: Colchester, London,  
Chelmsford, Clacton-on-Sea,  
Billericay**

**“There are some areas that can be very profitable, such as will writing, that are unreserved and could be much more profitable without compliance costs.”**

Stephen Mayson, honorary professor of law, UCL

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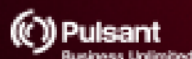
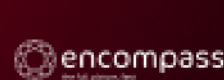
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Moving faster

**Peter Ambrose, founder of The Partnership**, on using **Infotrack's** conveyancing solution to improve client service scale quickly

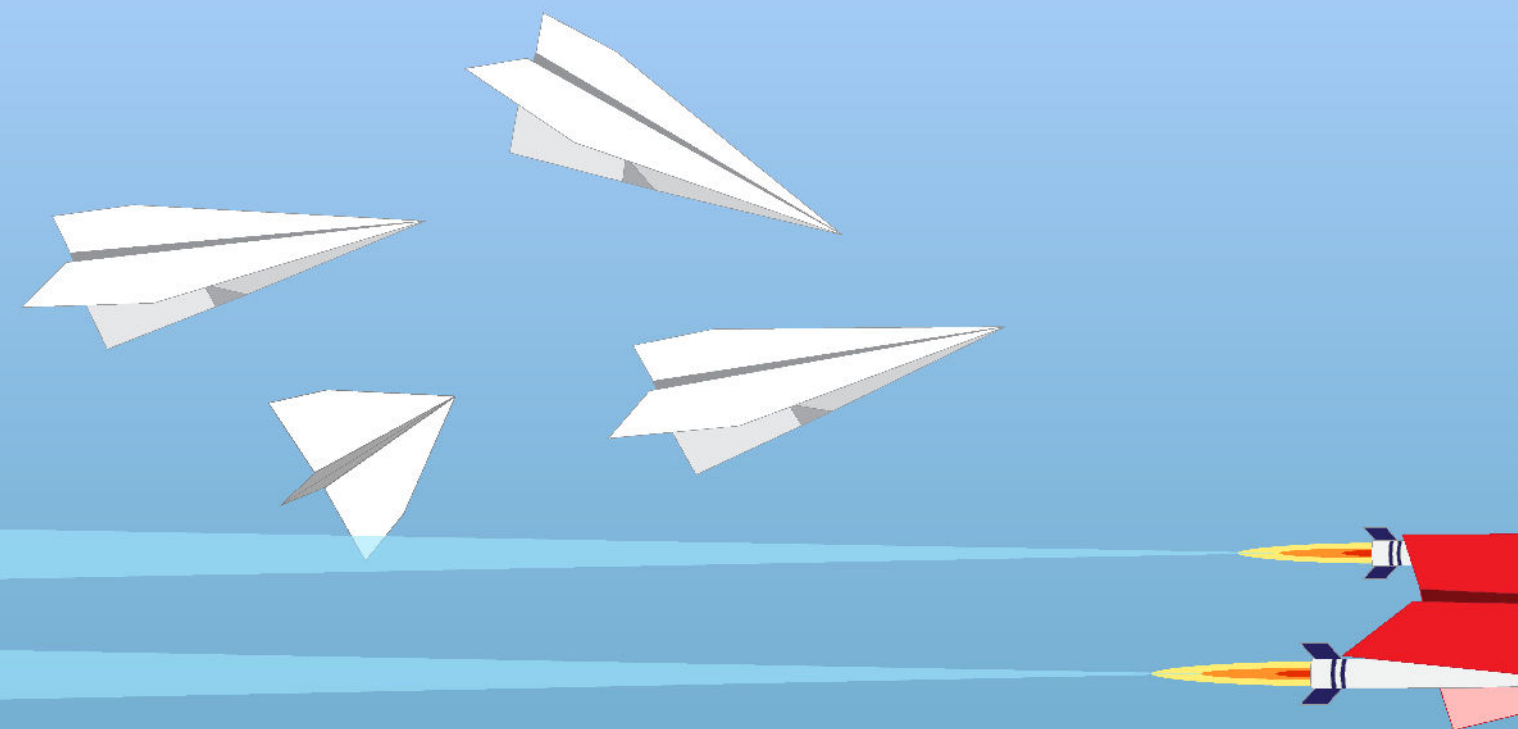
## 44 INTERVIEW

Know your change

**Jim Jack, head of professional indemnity at Travelers**, sets out how SMEs are well placed to drive innovation and meet new challenges







# QUICKER CONTRACTS



Martin O'Donoghue, partner at Kerman & Co, on how Thomson Reuters' Contract Express gives his firm the means to improve the efficiency and responsiveness of its legal service and better manage costs with document automation

**C**ity firm Kerman & Co is improving its efficiency with document automation – something many other SME law firms are exploring.

Partner Martin O'Donoghue says: "We want to provide a more efficient and responsive service to our clients – by using Thomson Reuters' Contract Express we can produce draft documents quicker, improve the quality and consistency of our service as a whole and, in the process, reduce costs."

The firm's long-term goal is to better differentiate itself in the market by offering a superior value proposition to old and new clients. "Technology will play a significant part in reaching that business goal," O'Donoghue adds.

"The benefits are clear. Document automation allows us to quicken the pace at which we produce documents while maintaining quality and mitigating risk."

## LINKING BUSINESS

At the moment, Kerman & Co uses Contract Express primarily within its corporate team. O'Donoghue says the firm started by creating generic documents it felt people in corporate would be able to use quickly and frequently.

"Every single corporate transaction we undertake commences with an engagement letter. As such, we thought it fitting to start our document automation

journey there as well."

Having automated a number of basic documents, the firm started a pilot programme where it made those documents available to its corporate team. Over a period of four months, it slowly added more documents to that range, which were taken directly from Thomson Reuters' know-how solution, Practical Law – and, in most cases, were infused with Kerman's own know-how to reflect the firm's unique style and brand.

"What I like most about Contract Express is that it's linked directly to Practical Law. Many firms our size depend on systems like Practical Law to provide both precedents and practice notes. For it to be integrated with Contract Express is a key feature as it means we are starting with base documents that we are familiar with and can customise," says O'Donoghue.

The firm now has access to a broad range of automated precedents through Contract Express, which have all been approved by the firm's partners – such as share purchase agreements, asset purchase agreements, confidentiality agreements, board minutes, and other documents that the firm uses on a day-to-day basis.

O'Donoghue says: "The range of clause options available within the system, and the ability to amend and supplement them, allows me to create bespoke

documents to suit different transaction types. That's quite important because, ultimately, our aim is to automatically produce a first-draft document that we don't need to amend heavily before we send it to for review."

And, he says, the firm is comfortable from a risk management perspective with the quality of documents that the corporate team is producing using the system.

### SIGN FOR SAVINGS

O'Donoghue says that firms need to get on board with technology or risk being left behind in the market.

"The reality is that the market is driving efficiencies. Clients expect lower fees and for law firms to take advantage of technology to provide cheaper, more efficient and higher quality legal services."

Contract Express also allows the firm to better manage work in progress.

O'Donoghue says: "We typically spend a large amount of time preparing documents such as share purchase agreements because there's a lot of manual work involved even in preparing a first draft. Automation helps reduce that time and work in progress."

The firm estimated the average time it took the team to prepare each document manually and automatically recorded how long it now takes each user on average to produce the same document using Contract Express.

"With this information, we can instantly see the time savings between the old manual process and the current document automation process.

"And having identified those time savings, we can multiply them by the fee earners' hourly rate to get an indication of the cost saving to the firm. We keep track of those cost savings, accumulate them, aggregate them, and maintain them in a datasheet."

Kerman & Co circulates monthly reports to its lawyers within corporate to highlight how much they are saving and where.

Contract Express also retains client information. O'Donoghue says: "We're not constantly putting in information about clients such as addresses and company names. The system pulls information directly from Companies House so we get the most up-to-date information."

### CLIENTS TALK

Kerman & Co has just started using Contract Express to liaise directly with clients externally. O'Donoghue says it now has a client pass facility where the firm can send information questionnaires to clients for data input. The data is then used within Contract Express for document preparation purposes.

"Because of the number of options available within documents, we can send a questionnaire to a client and they can select whatever option they wish. That helps speed up the document preparation process by

cutting out some of the work around liaising with clients via email or phone. This allows the firm to collaborate more efficiently with clients."

As for future use of Contract Express, O'Donoghue says Kerman & Co can see a number of uses and projects to pilot.

"We would like to establish an external

portal for clients. I could see a scenario where we would make a range of documents available to certain clients that they could complete online and download without needing to go through a lawyer.

"Obviously we have to give a bit of thought in terms of how we provide that model – whether that's a free, value-added, or subscription-based service. But it seems like a natural progression to cement our relationship with clients."

A combination of client interaction and use of Contract Express is going to be quite an interesting prospect, he adds. When it comes to clients, document automation has clear benefits – with it, SME law firms can improve efficiency and add value to legal services. **LPM**

#### LPM FIRM FACTS

**Kerman & Co**

**Revenue: £9m**

**Corporate status: LLP**

**42 fee earners, 67 total staff**

**Office: London**

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# MOVING FASTER



Peter Ambrose, director and co-founder of conveyancing boutique The Partnership, sets out how InfoTrack's software enabled his firm to process transactions quicker

**G**uildford-based The Partnership is vying to become the most respected conveyancing legal business in the country. The key to this goal, according to the firm, is growth, which it's achieving by using technology to enhance its clients' experience.

Peter Ambrose, director and co-founder of The Partnership, says clients want a fast and high-quality service when it comes to conveyancing, so they can move into their new home as quickly as possible and reduce the chance of problems arising. But it's challenging to produce an efficient and accurate service without using technology to implement workflows.

"Buying a house is an arduous process – I'm sure people inside and outside the legal industry would agree. There are multiple searches and submissions that need to be made from different sources as well as multiple invoices that need to be reconciled. All of these tasks drastically slow down the transaction – particularly if

mistakes are made along the way, such as an error on a Stamp Duty Land Tax form.

"The longer it takes to complete a transaction, the higher the risk of the deal falling through – which isn't good for us or the client. Speed is of the essence."

Ambrose says his firm chose InfoTrack to streamline its services because it was the most thought-out conveyancing solution on the market. He adds that there are several key 'pinch-point' processes in a conveyancing transaction such as property searches, Land Registry searches, Stamp Duty and Land Tax (SDLT) forms and API submissions. InfoTrack has enabled The Partnership to drive efficiencies in these areas through a single, convenient platform.

"The last thing we wanted was several individual solutions and that's why we chose InfoTrack. Their solution enables our lawyers to complete multiple tasks quickly on one solution that is integrated directly with our case management system – it also allows them to



**LPM FIRM FACTS****The Partnership****Revenue: £3.4m (forecast)****Corporate status:  
Limited company****16 fee earners, 60 total staff****Offices: Guildford, London**

reduce mistakes and speed up the deal, which in turn enables the business to attract more clients and grow."

**QUICKER CONVEYANCING**

Ambrose says that the firm selected InfoTrack to ensure it could maintain a market-leading speed of transaction completion by reducing potential problem areas and increasing productivity.

"Before we used InfoTrack's solution, fee earners would use several sites with different logins and had to key information manually into different forms. All of this wasted time that fee earners could have spent adding value to the service and helping the company grow."

But now, Ambrose adds, the process is significantly more efficient. For example, InfoTrack's Land Registry search technology allows lawyers to search for commercial and residential reports, including title documents and leasehold information in a fraction of the time it used to take. "The system brings back all Land Registry documents, including referred documents, so the lawyer doesn't have to return several times. They are then imported straight into our case management system and stored against the matter number. It's wonderful.

"Property searches are also carried out much faster, because much of the information is prepopulated by details already on the matter."

But the single most important efficiency improvement the firm achieved after using InfoTrack was in submitting SDLT returns.

"Doing SDLT returns was very time consuming through the standard government website – it's complicated and takes a long time to process. But with InfoTrack, we can submit these online with most of the data already pre-populated, reducing errors and minimising rejections."

**TRIAL AND NO ERROR**

Equally as important as streamlining processes in a conveyancing transaction, says Ambrose, is improving accuracy.

"Successful conveyancing is like doing an exam except that you've got to be 100% correct all the time and you've got to do it very quickly. Anything less than 'full marks'

will spell trouble for the lawyer and the company. With InfoTrack supporting the conveyancing process, we can significantly reduce inaccuracies and ensure that the transaction keeps moving.

He adds that by automating elements of the service and reducing manual processing of documents, the firm reduces the chance of introducing inaccurate data into the transaction. "We used to key data manually into SDLT returns, which sometimes resulted in mistakes being made and caused delays when making submissions. With InfoTrack's solution we simply pass property details that have been in use throughout the process and the system automatically prepopulates all the documents."

An unexpected benefit of the InfoTrack solution, Ambrose adds, was that the form layout was the same on screen as the submission – unlike the government system which was different and often lead to substantial confusion. "It's difficult to check if the client has made any mistakes when you're not working on the same form, and as such we would have to go back a few times to correct the data. With InfoTrack, the form is consistent and we can send a consistent proof to the client so they work off the same system as we do. It's tremendous."

**AGILE SOLUTIONS**

Ambrose says that while no solution is perfect, the firm benefits from InfoTrack's responsiveness to feedback.

"InfoTrack is happy to listen and make suggested changes. The people there are always happy to take our feedback and amend their systems based on our expertise.

"For example, we put in a change request to the firm to change the way we order a title document so we could request additional items easily, and they made the change quickly." He adds that InfoTrack is more like a business partner than just a third-party provider.

Ambrose adds that he's seen a massive improvement to the firm's service and become much more competitive as a result. While some conveyancing methods are outdated, InfoTrack is there for any firm that wants support to help them offer a fast and more accurate service to clients. **LPM**

**ABOUT THE SPONSOR**

**InfoTrack** provides award-winning technology challenging and evolving the way firms access data from a range of sources including Land Registry, Companies House, HMRC and more.

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# KNOW YOUR CHANGE

Jim Jack, head of professional indemnity at Travelers Insurance, on how SME firms are well placed to change to meet the challenges of an increasingly competitive market

**T**he only constant is change, they say – and that's certainly true in the legal industry. Brexit, technology and growing pressures from clients are making the market increasingly competitive and uncertain, and firms that don't change to meet these challenges may get left by the wayside. But SME law firms may be in a good position to take the bull by the horns, so to speak.

Jim Jack, head of professional indemnity at Travelers Insurance, says that while SME firms don't necessarily have the same access to resources as their larger competitors, being smaller enables them to be more nimble and agile in the market.

"Legal businesses, much like insurance firms, delivered services in the same way for

250 years. But they are starting to realise that customers won't accept that, and that firms which can deliver services in the way clients want them to will succeed.

"But while larger organisations can work with economies of scale, SME firms have the advantage of having smaller management structures and thus are able to change and meet market demands much faster." He adds that he and his colleagues at Travelers have already seen considerable evidence of SME firms' willingness to change through the various business plans they receive, which outline new ventures and explore alternative business structures.

But, Jack says, while SME firms should seize, and many are seizing, competitive opportunities, they shouldn't start to change

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**TRAVELERS** 

before they know what they're getting into.

"Change is a tricky process. There may be numerous compliance issues to consider or costs when changing how the business operates. It's important that firms do their research before jumping into anything and take advice from people who know the market and know where all the pitfalls are."

### SMALL AND NIMBLE

Jack says that an exciting element of the current legal market is SME firms beginning to think about how clients want legal services delivered, and exploring or implementing different ways to meet those demands.

"The change could be something as simple as adopting video conferencing technology, or it could be as drastic as changing an entire management structure. It's only natural that SME firms would lead the way since they are nimble enough to respond speedily to changing client demands and they benefit from the scalability of today's technology." He adds that a good example of this is firms using technology to make themselves more agile.

"At the extreme end of the spectrum, virtual or 'dispersed' firms – which operate like a network of consultant lawyers – have done away with their bricks and mortar entirely, and thus reduced overheads.

"Traditional firms have also become more agile by adopting flexible working and hotdesking, which allows them to scale their workforce without incurring greater overheads." He adds that allowing fee earners to work on the go also gives them flexibility to visit clients during non-working hours – which is something clients increasingly expect.

But it isn't just policies, processes and structures SME firms are taking advantage of, says Jack – smaller firms are also leading the way in new, niche areas of law and adopting a mix of disciplines to add value to their services. "For example, some firms have chosen to provide legal advice to tech startups and have hired non-legal IT specialists, who can add real value to that service. Some have even made those specialists full partners.

"I've been really encouraged to see different disciplines come together in SME firms to offer a broader legal service and meet client demands."

But the change could be even simpler, adds Jack. "I would argue that every firm needs to be innovative but that doesn't necessarily mean adopting the cloud or a new piece of software. Innovation could be as simple as a new manual process which allows you to speed up internal documentation or communication which saves time, improves the client service and leads to increased profitability."

The important thing, he adds, is to engage with clients and find out what they really want. "There are some firms whose clients want them to offer services in the same way as they always have. Firms shouldn't change just because they can – they should have a goal."

### KNOWLEDGE IS COMPETITION

But while firms should change to achieve competitive advantage, adds Jack, they shouldn't speed down the path to transformation without considering potential pitfalls.

"Whatever the change might be and whatever the firm's ultimate goals, there will be a significant amount of risk involved. Firms need to do their research to ensure they have their bases covered.

Jack adds that firms may consider engaging external advice if they truly want to mitigate against the risk of change. "By its very nature, firms won't have undergone a given change project before and it may be difficult for them to find out what to expect. If they engage the help of someone else who knows the market, however, they can reduce the chances of making any serious mistakes."

He adds that Travelers insures 1,600 law firms in England and Wales and has the knowledge to help firms undertake change.

"Travelers has advised hundreds of different law firms and accumulated large amounts of data and anecdotal evidence to help firms work out the risk involved in their venture. We try to reflect back to individual law firms what we have learned from engaging with the wider legal community."

Though changing to meet shifting client demands is a good thing and SME firms are in an excellent position to do it, the transformation process comes with risk – including profitability and regulatory pitfalls. So, if they want to undergo that journey they need to do their research or have an experienced partner on hand to guide them down the path. **LPM**

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**“SME firms have the advantage of having smaller management structures and thus are able to change and meet market demands much faster.”**





## Day in the life

### DAVID WOOD

IT DIRECTOR, FDR LAW

The IT director of a north-west firm on his daily life of keeping the lights on, managing projects and writing a book and PhD thesis on cybersecurity



**6am**

I usually get up at six o'clock and take one really good, strong cup of coffee. I'm not really a breakfast person so I won't eat anything before work. The first thing I do in the morning is check the firm's systems to make sure everything's operational with no unexpected glitches present. I live in northern Manchester and it takes one to two hours to get to our head office in Warrington in the morning – and the last thing I want is to be faced with 130 angry people because the system went down over night.



**7am**

I live in commuter-belt territory, so a drive that should take 30 minutes takes at least twice that thanks to congestion on the M60 and M62. I spend a lot of time looking at red lights on the back of cars. I used to listen to audio books, but since starting research for a PhD at Northampton University, I mostly read about cybersecurity and social engineering and those texts are not readily available nor particularly digestible as audio recordings. The same research is helping me write a second book on cybersecurity.



**9am**

Once I get into the office the morning is all about keeping the lights on. That involves checking in with the IT teams

and making sure they have everything they need for the day – whether that be physical or knowledge resources – and that normally keeps me busy until lunch time. Essentially it's a matter of resolving any calls that have stumped the support or development team.



**12pm**

I'm not really a lunch person either, which is hard to believe when you see the size of me. But when I do have lunch, I try and find a quiet corner in a local coffee shop and have an Earl Grey tea and read a book. I'll read up on current theories of the psychology of security to aid my PhD research or change management – because obviously IT, if you're doing it right, is all about change.



**1pm**

The afternoon is all about progress and looking after the firm's strategic projects – making sure that they're ticking along at the very least. We've got a significant number of projects on the board at the moment – at least 85. They can range from something as simple as a small automation process to a full integration of a cloud document management solution with our PMS.



**3pm**

One project I spend much of my time on is getting ready for

the GDPR – which amounts to going through every policy and procedure and re-writing them in the hope of making them more digestible. Policies tend to be robust rather than easy to read. This means they can be over the heads of most of the people who need to uphold them after May 2018. I am hoping to make them straightforward, without any loopholes, with easy to identify “take-away” information.



**5pm**

I like to leave at five o'clock so I can get home to my wife and two children. The bit of time I get with them before bedtime is what keeps me on the right side of the insanity line. We normally play or build something – they're both very crafty. It amuses many people to see this other side of me when my wife leaks something about me onto Facebook – I think many people believe the firm puts me in a cupboard to recharge overnight.



**8pm**

Once the kids are in bed I'll spend time when quiet writing a few more pages of my book or working on the PhD. I wrote my thesis for my MBA, also at Northampton University, on the affordability of cybersecurity. On the back of that I'm writing the book about how SME firms can afford good infosec on a lower budget. It's very challenging and hard work but much more interesting than watching reality TV. [LPM](#)

**“** I'll read up on current theories of change management – because obviously IT, if you're doing it right, is all about change. **”**



#### ALL ABOUT

**David Wood**

**Works in Warrington**

**Likes puzzles**

**Dislikes lack of co-operation**

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