

FEBRUARY 2019

LPM

LEGAL PRACTICE MANAGEMENT

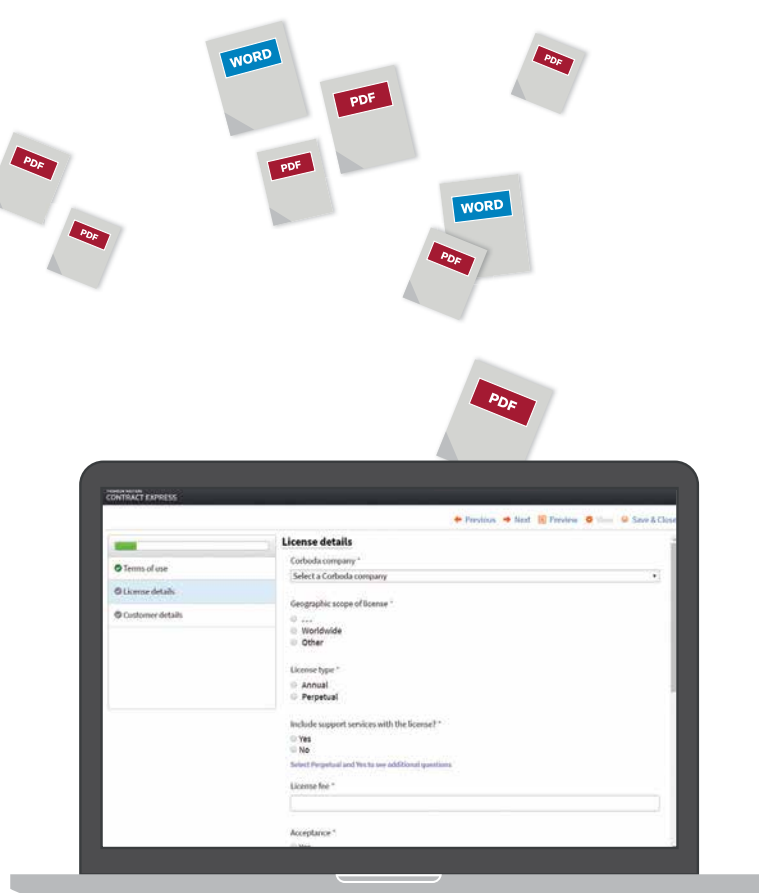
5TH

BIRTHDAY
EDITION

THE ONLY
MAGAZINE
FOR LAW FIRM
MANAGERS



BUSINESS INFORMATION FOR EVERYONE IN PRACTICE MANAGEMENT



Thomson Reuters Contract Express

Automation software for law firms.

Much more than just legal document automation software, Contract Express uses intuitive questionnaire technology for fast and accurate document drafting and enables firms to offer innovative client facing services. It is also used by sales teams, HR departments and more, to streamline document creation and save huge amounts of time.

Contract Express integrates with your firm's templates or Practical Law so you're equipped with industry standard documents from the starting line.

Simplify the drafting of your legal documents.

Visit legal-solutions.co.uk/contractexpress to find out more or request a demo.

The intelligence, technology
and human expertise you need
to find trusted answers.



the answer company™
THOMSON REUTERS®

WELCOME

About us



Kayli Olson is LPM's editor. She spends most of her time picking up British slang and playing board games.
kaylio@lpmmag.co.uk



Emily Nash is LPM's client services contact – and resident musician. Email her for advertising options!
emilyn@lpmmag.co.uk



Rupert Collins-White is content director. He was an IT hack until 2005 when he tunnelled out with a plastic fork.
rupertw@lpmmag.co.uk

Welcome to the first LPM issue of 2019! I don't know if you noticed but this month marks a very important date for us here at LPM. It's been five great years of getting under the hood of SME legal practice management! Let's make this year another great one for the market.

What better way to start off the year than by diving into SME law firm innovation? That's right, it isn't just for those magic circle firms and their hubs. Read how firms like yours innovate every day on p18.

Also hear from the founders of Wavelength Law, the three-year-old, first regulated legal engineering firm. What does it mean? How will they compete in the market? Find out on p24.

And congratulate Emma Sell, now partner and head of operations at BDBF, on her journey to become a non-lawyer partner at the firm (p8).

Are you joining us for LPM conferences this year in London, Bristol and Leeds? Check out the latest agenda (pp26-27) and get involved in LPM's first ever awards ceremony! Yes, you heard me. LPM will be rewarding firms for practice excellence in two categories: people and engagement, and service delivery efficiency/innovation. More on this can be found on our brand-spanking-new website: www.lpmmag.co.uk

Here's to another five years, and beyond.



It's been five great years of getting under the hood of SME legal practice management!

0800 014 2445

LPM@lpmmag.co.uk

Burlington Media Group
20 Mortlake High Street
London, SW14 8JN

Kayli Olson, editor
[@LPMmag](https://twitter.com/LPMmag) | kaylio@lpmmag.co.uk

IN PRACTICE

07 Your view: Should SME law firms publish their gender pay gap statistics?

COLUMNS

08 Emma Sell at **BDBF** on getting a P45, despite continuing in the same role, and becoming a non-lawyer partner

11 Victor van der Poel at **Accesspoint** answers a raft of innovation questions

12 Martin Palmer at **Pulsant** on the challenges and benefits of implementing artificial intelligence

13 Natasha Rawley at **ADDS** discusses the crucial elements of a healthy workplace environment

14 Alex Williams at **Tikit** looks at the obstacles that practice management systems must overcome to be successful

FEATURES

18 Feature: Innovation isn't always easy, so what does it take to make it happen? **Kayli Olson** investigates

24 Law firm profile: The team at **Wavelength Law** explain what it means to be a legal engineer

INDUSTRY VIEWS

30 Mark Garnish at **Tikit** explains the secret tech project that's set to bring gradual change to law firms

34 Jon Whittle at **LexisNexis** on how to create a genuinely client-centred culture

36 Andy Michael and **Paul Tozer** at **Quiss** on getting off the ground working with Microsoft Azure

REAR VIEW

38 Data story: January blues getting you down? Or is it actually your expenses admin?



Would you like your practice to be paper lite?



1. Call ADDS, we can help!

2. Book your free consultation.



3. We organise and pack.

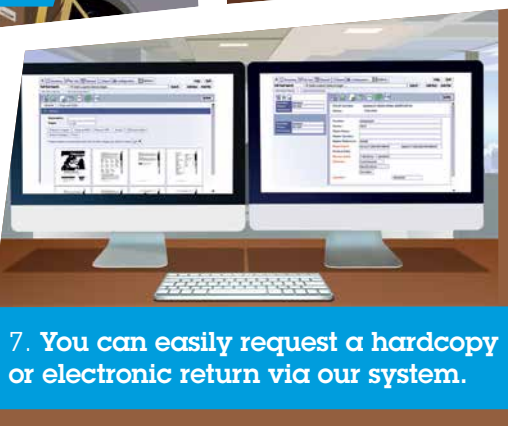


4. Then uplift and transport to our secure records management facilities.

5. Each file is barcoded and indexed.



6. Then stored safely and securely.



7. You can easily request a hardcopy or electronic return via our system.

**Archive
Document
Data
Storage**

You can count on us

Contact us now for a free consultation

☎ 0800 328 0272 | 💻 www.archivestorage.net | ✉ filequeen@archivestorage.net
📷 @filequeenadds | 🐦 @filequeenadds | 📘 ArchiveDocumentDataStorage

IN PRACTICE

SNAPSHOT CLARITY BEGINS AT HOME

The new year came and went, picking up from the problems of December in sheer earnest, and January has brought with it a slew of new developments and regulatory intrigue for SME firms to unpick.

In mid-January, **HM Courts and Tribunals Service (HMCTS)** launched its **full, self-service probate application system**, enabling the majority of named executors in England and Wales to bypass both law firms and registry offices.

The new system has been tested by a limited pool of users since 2017 and was part of the £1bn court reform programme pushed by the HMCTS.

The online function supports the swearing of a statement of truth digitally, among other things, and as many as four joint executors may submit an application together.

Despite the obvious potential implications for firms specialising in wills and probate, those working in the field cautioned customers against relying solely on the new self-service platform, and identified key areas where solicitors' advice was still crucial.

The Legal Services Board (LSB) has deemed that decision-making processes followed by the Solicitors Regulation Authority (SRA) are inadequately explained and must be made more transparent.

Although the SRA received the minimum score required in a new assessment framework devised and implemented in December 2017, there were several ways in which the regulator could improve its behaviour.

Specific measures to be taken included: publishing evidence to back up decisions made by its board and executive, developing a better method for testing solicitor advocate competency, and creating a new digital register that will record disciplinary information related to solicitors.

A review of the SRA's progress on



these improvements is to be held in May.

Firms involved in property transactions may be at a disadvantage compared with licensed conveyancers, following recent advice from the SRA.

Birmingham-based solicitor Andrew Kerr at Kerr Hands & Co asked whether a firm would be able to hold a reservation deposit for sellers in a similar manner to holding a deposit when contracts are exchanged. The SRA advised that they should not do so.

"This is because firms will not yet be providing connected legal services to the seller," the regulator stated.

In response, Kerr said: "We could see law firms in effect being pressurised to join an alternative regulatory body for conveyancing or potentially calls for an alternative regulatory body for solicitors." **LPM**

✓ Have you got a story or report for us? Write to lpmmag@lpm.co.uk

Be careful not to let important issues get lost in translation

IN NUMBERS

Blinded by science

Despite the buzz around legal tech, most junior lawyers don't really know what it is, according to a survey by the Junior Lawyers Division, published in January 2019

49%

of junior lawyers didn't know what legal tech was, prior to completing the survey

63%

of junior lawyers said that tech was not having an impact on their current job responsibilities

2%

said they had been given all the training and information they needed by their law school

Source: JLD January 2019 LawTech Survey

LPM

LEGAL PRACTICE MANAGEMENT

SPECIAL READER OFFER

OFFER:
5% OFF
YOUR FIRM'S
FIRST YEAR OF
TRANSCRIPTION

SIGN UP ONLINE
OR QUOTE
LPM2016
WHEN CALLING

CUT COSTS, INCREASE EFFICIENCY

All firms could benefit from outsourcing transcription to dictate2us – but even more so with our **LPM** deal: **5% off your first year**

"d2u is the UK's number one outsourced transcription service for medical and legal professionals and highly competitive all over the world. We pride ourselves on saving our clients time and money, as well as offering state-of-the-art security and a first-rate service."

Daryl Leigh, CEO, dictate2us

LPM

LPM magazine has agreed a special deal for its readers with dictate2us – 5% off your monthly transcription bill for one year if you sign up through the dedicated **LPM** link, or call and quote **LPM2016** when signing up. You can trial the service for free before committing.

Use d2u and enjoy the benefits of:

- Fast turnaround times
- Secure and confidential service
- Secetarial cost reductions of up to 60%
- Guaranteed 98.5% minimum accuracy
- iPhone, Android and Blackberry apps with one-hour turnaround
- 100% output - only pay for the time you talk
- Free, no obligation trial



The d2u Transcriber app is free to download from Apple and Android app stores and BlackBerry App World

www.dictate2us.com/lpm



This special LPM magazine reader deal only relates to customers that execute an agreement for a minimum term of 12 months with a minimum monthly commitment of 500 minutes. LPM magazine sought two law firm references for dictate2us to verify its claims for quality and delivery. The 5% deal only applies to the first paying year the customer is with dictate2us. LPM magazine is not responsible or liable in any way for work done by dictate2us and is an advertising referrer only.

YOUR VIEW



RHIANNON CAMBROOK-WOODS
MANAGING DIRECTOR,
LYSANDER LAW

The initial release of the gender pay gap statistics disclosed by the UK's biggest companies was a step in the right direction when considering pay disparity in the UK. It's true, the legal sector is one of the top culprits, with disappointing figures linking women to senior positions. Dismal statistics show that 78% of large firms are paying men more, which definitely needs to see a turnaround. I think the scrutiny incurred when releasing gender pay statistics, particularly for SME firms, which likely are more proportionate than the Big Four or larger companies, will be a motivational force for the corporates, which have a lot further to go when it comes to pay equality in law.



Following a recent recommendation by the Law Society concerning firms with fewer than 250 employees, LPM asks:

“Should SME law firms publish their gender pay gap statistics?”



FLORENCE BROCKLESBY
PRINCIPAL, BELLEVUE LAW

The extension of the pay gap reporting to smaller organisations is to be welcomed in principle. As a direct result of last year's reporting, we've seen some organisations really tackle major imbalances. However, for reporting to work for smaller firms with fewer resources, it needs to be simple to avoid becoming an administrative burden. Clearly, we'd also want to avoid jigsaw identification of individuals at smaller organisations.



Follow LPM on Twitter
@LPMmag

Want to write us a letter? You know, that thing no one does anymore? You can email us a letter for publication to lpm@lpmmag.co.uk, or post us something to: LPM magazine, 20 Mortlake High Street, London, SW14 8JN.



JASON RAHMAN
PRACTICE MANAGER,
SYKES ANDERSON PERRY

Yes, they should but more information is needed. Gender pay gap stats are probably widely regarded by the broader public as an attempt to do just that. Therefore, most people would conclude that a 10 to 15 percent pay gap means there is residual discrimination on a large scale. However, that is very misleading. They do not tell us what we need to know, which is whether there is equal pay for equal work at all!



ANNA WILSON
EXECUTIVE PARTNER,
BARCAN+KIRBY

Yes, all smaller firms should be transparent and publish their statistics in relation to pay. For accurate results, however, the reporting mechanism for measuring the gender pay gap should be changed, so that it compares men and women with the same number of years' experience and who are in the same role. At Barcan+Kirby, we are proud to support and develop everyone equally. Our partners are 53% women, compared with the industry average of 33%. We recruit the best person for the job and advocate equal pay for equal jobs, regardless of gender.

Do you need a next day delivery that's guaranteed?

Your documents are sensitive, urgent and business critical. Our tracked services provide delivery reports, online tracking in real-time, and with next-day delivery by 9am as standard.

For more information email exchange@thedx.co.uk or visit dxdelivery.com/exchange



ALTERNATIVE TRACK

EMMA SELL, PARTNER - HEAD OF OPERATIONS, BDBF



I did not set out to become a partner in a law firm when I finished my A-Levels and started working in a local solicitors' office in Norfolk. Fast forward 21 years, and I'm an equity partner at a London law firm.

In 2012, alternative business structures (ABS) were allowed to provide legal services. This was initially seen as a competitive threat to the traditional market. It may still be a threat, but one benefit of being an ABS is that the firm can appoint non-lawyers to partnership roles.

My journey to becoming a non-lawyer partner may well be different to many others' – I wasn't a lateral hire and I didn't do a similar role in another environment. It went as follows: office junior, legal secretary, PA, office manager, then practice manager. I didn't plan to make partner, I just wanted to learn everything I could about whatever task I was undertaking, from answering the phones through to drafting management accounts. I had no career path and deliberately didn't set goals. Working in so many different roles in business support gave me a wide-ranging outlook on what it takes to make a law firm successful, and what keeps staff motivated. However, around 2013, I decided that I wanted to make my experience 'official' as my A-Levels were becoming irrelevant. I did a year-long post-graduate qualification in legal practice management at Manchester University to prove to myself that I was qualified to do the job I was already doing.

Practice managers are involved in every aspect of business operations: nothing goes on without you knowing about it or being required to make it happen. Such knowledge makes you an integral part of senior management because you can offer a broader view of how decisions will impact every aspect of the business and its people. I'm generalising, but many lawyers are by nature technically-minded people, and possibly lack the soft skills required to keep things on an even keel. Trusting you to get this right, removing this burden from lawyers, allows partners to concentrate on growing the business. However, even though I felt like I was being treated as an equal, I was not a partner so had no voting rights if I was adamant about something.

So, during one appraisal, I raised the possibility of the firm appointing non-lawyer partners and we agreed that I would look into what was involved and report back. What I did not know was that our managing partner had had the same thought. He put it to the vote: if I could sort out the ABS conversion and become an 'authorised person', I would be invited to the partnership.

Unlike the lawyers, I didn't have to meet certain criteria or objectives. However, my path wasn't without its own challenges. We had to devise a new remuneration policy because a non-lawyer cannot be benchmarked against a lawyer in terms of the amount of work they have generated. Also, I didn't have any hours or billing targets to be measured against. It was a learning curve for all of us, but it definitely sent a positive message to other members of our support team that it was possible to reach the highest level.

In reality, nothing has changed: my job is exactly the same (although getting my P45 was a bit frightening). However, it does feel a bit different, and it's nice to be recognised and valued for what I do. The 18-year-old me would be very surprised! **LPM**

ABOUT

Emma Sell
Partner – head of operations
BDBF
www.bdbf.co.uk

Revenue: £2.9m

Corporate status: LLP

**15 fee earners,
20 total staff**

Offices: London



Transform your legal practice with intelligent business software from Linetime

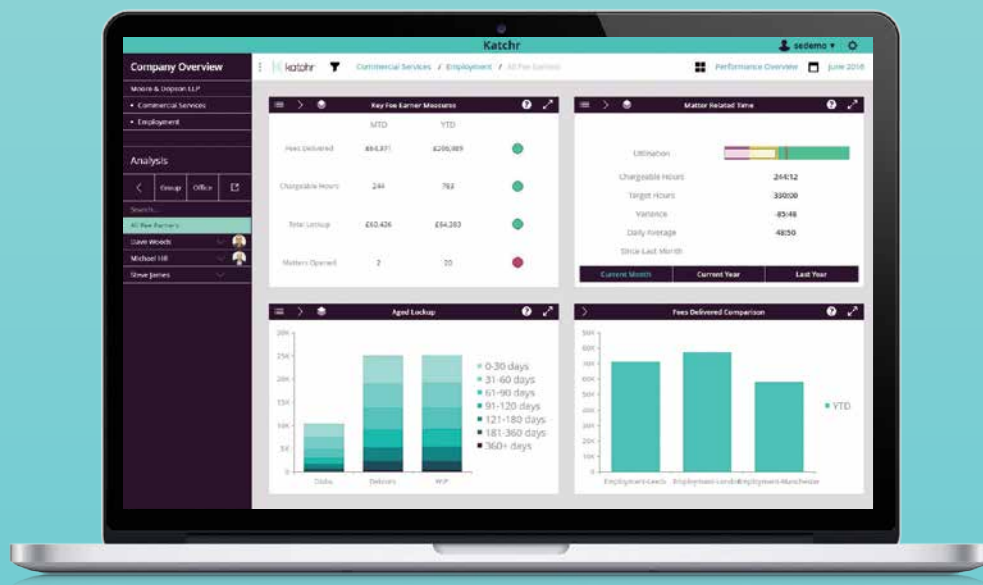


A structured approach to case management and document production has helped to transform the operational efficiency of some of the UK's foremost law firms and in house legal teams.

The Liberate software modules provide intelligent workflow to promote effective communication and interaction between departments, staff members and clients.

“

"



www.katchr.com

Q&A

Uber SME

Victor van der Poel, director at Accesspoint Technologies, answers questions on keeping up with the tide of change and disruption in 2019, and what innovation should really mean for SME law firms



Q How can we be more innovative?

A This is a question I frequently get asked and my short answer is: don't make things difficult, look at what you already have and what's readily available in the marketplace to join up the gaps where you perhaps need smarter thinking applications to improve efficiencies. Innovation means 'into new' but in today's business world, and for many, innovation is thought of as something 'completely new' – a disruptive service, product, device or novelty, generated and brought to life by using a certain mindset or thinking methodology, that goes beyond the present and into the future. A slight difference in perception.

Q Do you have any examples of innovation?

A Uber springs to mind. Taking a basic, familiar idea (a taxi ride) and re-presenting the service offering to the marketplace via newer, more familiar, more progressive hardware and software (in this case, a smartphone and an app). Underneath all of that is a revamped and remapped service delivery methodology, but the end product remains the taxi ride. Often, innovation is considered time-consuming, risky and expensive: not something falling within the

immediate business remit or practising philosophy of today's pressured SME law firm. When we talk about innovation in our sector, we need to distill our interpretation of innovation into its basic and constituent parts – what separates actual innovation from everything else? For me, it comes down to improvement. Without improvement, innovation isn't really innovation, it's just the taxi ride.

Q Why do we need to be more innovative?

A Relentless disruption, change and innovation. These are again the key themes in 2019 for lawyers and their practices. Law firms are seeing increasingly sophisticated technologies alongside peer and client pressures, plus ever-advancing regulatory systems and processes. Law firms are in a demanding race to keep up. However, these changes also present an opportunity to reimagine legal services to better meet market demands. Hundreds of companies across the globe now develop and sell technology to the legal market. Leading law firms are appointing dedicated technical teams to combine innovation and legal skills. The need for SME law firms to join the hype has never been more important.

Q Where do I start?

A Work with what you already have (your taxi ride). This could be your PMS. Reuse existing PMS functionality to its full potential. Then look to the market for bolt-on best-of-breed products, which can leverage the stateless APIs (interfaces) of most PMS solutions. Then look at how other business process automation software could benefit you by integrating within and around your PMS. We work with firms who have started this type of thought process. They are the innovators in terms of how a modern law firm can operate using a totally joined-up business software platform. Soon we will have CRM solutions and full web integration as a daily automated 'take it for granted' process enhancing your PMS. **LPM**

Send Victor your questions:
victor@theaccesspoint.co.uk

ABOUT

Accesspoint Technologies
Legal IT provider, dedicated
to managed IT services, cloud
and beyond.
Contact: 020 3189 2645
www.theaccesspoint.co.uk

Accesspoint
Technologies

Where people make the difference

AI FRIEND OR FOE?

MARTIN PALMER, THE CLOUD EXPERT



According to entrepreneur Sebastian Thrun's recent TED talk, AI should be seen as the augmentation of people. AI helps us to make sense of our organisation's data. It's a combination of software and data that uses functions of machine learning, natural language processing (NLP), vision recognition, speech, planning and robotics to organise, interpret and action big data.

For a legal organisation, this means delivering greater value and efficiency by benefiting from previously learned information, and more time to spend on cases and with clients – delivering human value. As we saw in the December LPM survey, 14% of respondents would prefer to receive legal advice from a robot!

Eversheds Sutherland talks about blending AI technology with lawyers, project managers and consultants. When Eversheds needed to examine 16,000 documents, its AI platform dismissed 88% of those documents as irrelevant to the case. Just think about the cost benefits and time saved. The firm also found error rates of approximately 7% when humans checked through a raft of documents. AI has an error rate of 0%.

Clearly, AI has many benefits, but some people are worried that it may replace their roles. So, is AI an opportunity or a threat to the legal profession? It may be more appropriate to reframe this as 'What is the threat if AI is not adopted by law firms?'

“ AI should be considered carefully since it doesn't automatically provide all the answers to speeding up processes and workflows, and legal responsibility for errors is not yet clearly defined. ”

AI is an emerging technology, so is expensive to implement. But new ABS entrants to the market (insurance companies, the Big Four, consumer brands such as AA and Saga) will already have well-developed technology investment cultures and experience with developing and deploying new technology. These organisations will be eager to acquire, through price reduction, the low-hanging fruit of commodity services: wills, personal injury, conveyancing, contract automation and risk analysis.

For the more cost-conscious, it's advisable to use the new AI features being developed within

your existing software partners and test the ROI these bring, leveraging the providers' larger datasets and development. Whatever your size, it would be a mistake to ignore current AI technology or avoid keeping up with future trends.

However, remember that AI is just a combination of (human-designed) software and data: output is only as good as what you put in (not forgetting the potential bias inherent in design). AI should be considered carefully since it doesn't automatically provide all the answers to speeding up processes and workflows, and legal responsibility for errors is not yet clearly defined. However, when deployed effectively, AI does in principle enable lawyers to focus on higher-level key matters.

Don't fall behind – look at the options available now. CBRE found that nearly half of London law firms are already using AI, with a further 41% planning to do so imminently. Deloitte also predicts that over a million roles in the legal sector will be automated by 2036.

The case for AI in the legal sector is clear. For many, the challenge is in the implementation. However, by seeking out the right skills and expertise, firms can work towards realising the benefits of AI. **LPM**

ABOUT

Pulsant
Enterprise class
cloud computing
Contact Martin on:
0333 270 5989
www.pulsant.com
[@PulsantUK](https://twitter.com/PulsantUK)



THE YEAR OF WELLNESS

NATASHA RAWLEY, THE FILE QUEEN

Welcome to 2019, LPM readers. Breathe in that 2019 air! Are you ready for the year ahead? It's #2019theyearofwellness.

"What?" I hear you cry. "I haven't seen that hashtag yet!" Well, let me tell you, it's a wonderful movement centred around the quality of life for team members within the working space.

We constantly hear about big tech firms with their snooze pods, fun slides and 100 breakfast cereals – a mere dream to those of us outside that sector. But here comes something better – the wellness movement. A long-term client of ADDS invited me in as they were refurbishing three of their office spaces. They wanted to discuss moving all files offsite, and needed help with the rollout of a new policy which only permitted scan-on-demand files back for retrieval – no hardcopy files would ever be recalled from the archive. When I asked why they had finally made this leap, they stated: "working environment wellbeing."

Now in all my years of being onsite with clients, none had ever singled out 'wellbeing' as the reason for going paper light, so I had to investigate further. I asked the client for more information and they directed me to www.wellcertified.com.

So I went into research mode. This new movement is all about promoting health and wellbeing at work. This makes total sense: an environment centred around the wellbeing of your team makes people feel happy and nurtured – they'll want to spend time at work, leading to increased productivity, happiness and dedication. Why wouldn't you want to create a working environment like this? Now the certificate is amazing, but some of us are stuck with the building we are in and with small budgets assigned to environmental changes. However, there is more ...

When I examined the standard, I found that there were seven elements in total: air, water, nourishment, light, fitness, comfort and mind. The more I read, the more it made sense.

When it comes to quality of air, many of us work in large cities or near main roads which can have poor air quality. This impacts individual health and can also cause SBS (sick building syndrome). You cannot pick up your office and move it, but there are solutions, such as filtered air conditioning systems and purifying fans.

The 'water' element is about easy access to clean drinking water, so providing your team with water filter taps or water coolers. Make sure that people don't have to go up four floors to fill their bottle. Good hydration equals productivity.

The 'nourishment' element (yummy!). Longer working days, high periods of inactivity and busy lives lead to poor diets. We have all skipped lunch or inhaled a horrible sandwich to keep us going when deadlines loom. Why not splash out a bit of money each week on a fruit crate for the team? All those powerful vitamins will fight germs! Ask the managing partner for a monthly nourishment budget so that you can have a weekly stock of healthy food and snacks in the office.

Read my next column for a breakdown of the other elements. **LPM**

"An environment centred around the wellbeing of your team makes people feel happy and nurtured – they'll want to spend time at work, leading to increased productivity, happiness and dedication."



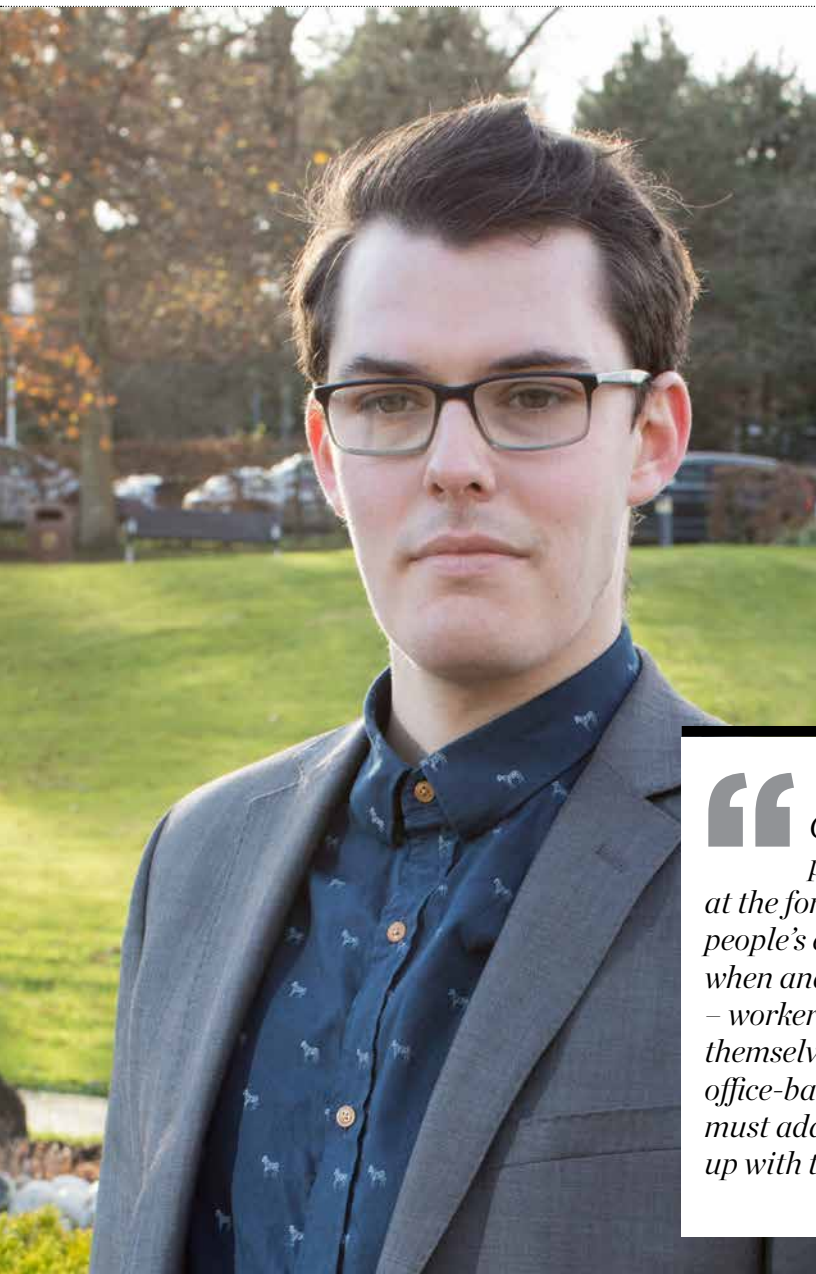
ABOUT

ADDS
Saving firms from
paper hell
Contact Natasha on:
0800 328 0272
www.archivestorage.net
[@filequeenadds](https://twitter.com/filequeenadds)



PRACTICE PERFECTION

ALEX WILLIAMS, THE TECHNOLOGIST



A practice management system (PMS) is designed to be a firm's central hub – essential to the smooth, efficient running of the firm. However, if these systems are to retain this vital role, they'll have to move with the times.

What does that mean? Technology is not only getting slicker, faster and more accessible, it's enabling a profound change in workforce dynamics. Consumer devices in particular have been at the forefront of changing people's expectations about when and where they can work – workers want to unshackle themselves from a nine-to-five, office-based model and PMSs must adapt if they want to keep up with this trend.

A PMS will have to re-architect so that it's available 24/7 from outside the office, preferably in a way that doesn't involve cumbersome logins to the office network. Usability is also a consideration. Lawyers will want to access the system while they're on the move – they may be on a train while using a smartphone or a tablet. Legal tech developers need to ensure that systems are usable on devices with small screens and keyboards.

Another point of adaptation is that systems will need to increase visibility. The different parties using the PMS are likely to be physically dispersed, so there will be value in developing functionality that tells one hand what the other

hand is doing. For example, a solicitor on a train may raise a payment, which the finance department can pick up via the system and progress.

Finally, in a world of cyberattacks and increasing concern over data privacy (like GDPR), PMSs will need protocols to ensure tight data security, and that data can only be accessed by the right people.

To remain relevant, a PMS must make these adaptations. A case in point is Tikit's Partner for Windows (P4W). We were able to launch our new strategic roadmap for P4W when the product celebrated its 20th birthday at the P4W National User Group Conference, held last month in London.

This roadmap outlined how Tikit is altering P4W's architecture to securely extend its remote accessibility, and how the user interface is being updated to ensure enhanced usability and agility on a range of devices. We're also streamlining the capacity to integrate P4W with other best-of-breed solutions to provide an all-in-one application. We've also developed digital signatures and instant client messaging.

Firms must be confident that they're using the right legal technology – systems must both serve the firm's current needs and be future-proofed. With P4W, firms will get that: Tikit has an established track record in horizon scanning and ensuring that its customers always have legal tech which meets their fast-evolving needs. Your firm's PMS vendor must do the same. **LPM**

“Consumer devices in particular have been at the forefront of changing people's expectations about when and where they can work – workers want to unshackle themselves from a nine-to-five, office-based model and PMSs must adapt if they want to keep up with this trend.”

ABOUT

Tikit
Leading practice and case
management provider
Contact Alex on:
01489 609 010
www.tikit.com
@TikitGroup

tikit

Cashflow funding exclusively for law firms

- PII premiums
- Partners/Members/Directors tax
- Corporation tax
- VAT
- Practising certificates
- Litigation finance
- Working capital
- Capital expenditure
- Flexible repayment terms available

For more information, talk to us today
01202 835 035 | info@iceberg-partners.co.uk

iceberg

Iceberg is a trading style of Paragon Technology Finance Limited, Registered in England, Company Number 01639510, Registered Office 51, Homer Road, Solihull, West Midlands B91 3QJ. Paragon Technology Finance Limited is authorised and regulated by the Financial Conduct Authority and is registered on the Financial Services Register under reference number 734916

Specialists in Legal IT

Accesspoint

Legal Services

Where knowledge makes the difference

World Class Legal IT services

- Data conversion & migration
- Development & training
- Solutions consultancy

Independent specialist provider

Contact us on: 0203 189 2645 www.theaccesspoint.co.uk/legal

Accesspoint

Your gateway
to intelligent
Legal IT
solutions



MHA MacIntyre Hudson
Chartered Accountants, Tax and Business Advisers

*Professionals in
partnership*

Specialist accountants for Professional Practices

- Business Advisory
- Accounts, Audit & Assurance
- Partnership & Personal Tax
- SRA Outcomes-focused regulation
- Mergers & Aquisitions

Follow us



@MHupdates



MHA MacIntyre Hudson

FEATURES INDEX

HOW DO YOU DO?

How are leaders in the legal industry making innovation work for them?

18 FEATURE**Innovation Nation**

If you can make tax sing and regulations rhyme, perhaps you can drive innovation. But what else does it take to make change happen? **Kayli Olson** reports

24 LAW FIRM PROFILE**Defining legal**

Disruption is all around – what does it take to be a legal engineer? **Wavelength Law** on what it takes to be a successful new entrant





Innovation nation

What does it take to innovate in an SME UK law firm? Kayli Olson reports

Whoever thought innovation was only for top-tier law firms surely didn't take a look into the SME market to see the firms that practice it every single day.

It doesn't take big budgets and fancy innovation hubs to make innovation happen in your law firm – innovation for SME firms takes four basic ingredients: an understanding of purpose, collaborating with other businesses, creating action and, above all else, focusing on the client.

Ed Turner, managing partner at Taylor Vinters, says the key to innovation is about achieving positive change that furthers your strategic goals.

"In the SME market, it's crucial that any firm trying to innovate starts with what its purpose and identity is. Clarity around this informs what positive change and valuable innovation could be."

Vidisha Joshi, managing partner at Hodge Jones

& Allen, says: "As a firm, when we consider innovation, we're always very clear in defining what it means to the business."

For her, innovation is the successful introduction of a product or service. Innovation can and often does involve technology but it's not always a fundamental component.

Turner agrees: "Traditionally, people may have thought about innovation as the application of technology but it could also simply mean stopping something that you do to ensure alignment with your purpose and identity – as it was in our case."

'Innovation' is just a word if it does not include execution, says Gary Gallen, founder and CEO at radar.

"Real legal innovation has an effect that you can see and feel. And it should be about improving lives, performance, and the environment through



reconsideration, relearning, reshaping and redesign.”

And, he adds, that doesn’t necessarily mean it has to be unique and never done before. But whatever it is, it has to be done with the clients’ needs involved in the design and a focus on delivering their outcomes.

ACT

Taylor Vinters’ reimagining started in 2008 with the introduction of a new management team, which included Turner as managing partner. The manifesto was simple: in order for the firm to succeed in the future it needed to be sure about its identity and purpose, and focus on the clients that were relevant to that.

“The first thing we did was stop doing work for some clients. This meant we could really focus on the clients and work that we were passionate about – innovators and entrepreneurs – and where we could genuinely empathise with our clients.

“It allowed us to become a valuable part of that ecosystem in our own right,” says Turner.

rradar was born with an alternative model and way of working – it doesn’t use hourly rates and so works on a different basis, with training and education programmes and subscriptions.

Gallen says: “We are a knowledge transfer platform. We succeed only if the data that we have collected, analysed, and labelled in our heads is shared with people.

“Law firms are the custodians of society. Lawyers will not thrive if they keep their years of knowledge and training locked up inside their heads, trying to be clever one case at a time, reactively.”

Every interaction gives an insight that the firm can analyse, recycle and feed back to help clients, he says. Therefore, all of rradar’s interactions have to be active, reflective and applied across work areas to educate and empower the client.

Alastair Fernie, managing director at catastrophic injury firm CFG Law, says change is a fundamental part of innovation.

“You can either change, or put your head in the sand and ultimately end up in a difficult situation further down the line. The things that we do for our business must come with the longer term in mind.”

The firm went through a rebranding exercise following market research and focus groups to better understand the views and needs of its clients.

“You can change, or put your head in the sand and end up in a difficult situation further down the line. The things that we do for our business must come with the longer term in mind.”

Alastair Fernie, managing director, CFG Law

“This was key in establishing the base from which to change along with having the right team in place to lead change.

“Our core values, which we redeveloped as part of our culture review, now revolve around support and innovation for our clients.”

Fernie says this means that the firm not only involves lawyers in the practice, it engages with clients using what he calls client support managers – who are also occupational therapists and nurses by trade.

Over at Ellisons, innovation is quite pragmatic, says COO John Turner. The firm has been around for 255 years – which is not to say that it can’t innovate, but it has historically been a risk-averse and conservative firm.

“Ellisons’ ethos is for partners to pass the baton on to the next generation, who will then lead the firm in a better way and shape than it was previously. This is continuous, and so we continually try to reinvent ourselves and explore technology and areas of growth.”

COLLABORATE

Collaboration isn’t something that should just happen internally – as they say, a rising tide lifts all boats. Healthy competition is always beneficial for business, as it encourages players in the market to push each other to further develop and find new solutions.

But the same can be said for collaboration between competitors, other law firms or even just other businesses and individuals.

“Collaboration is the true innovator and that’s where you can get that uniqueness from,” says Gallen at rradar.

That’s where the profession moves in a genuinely new direction focused on delivering the best client outcomes.

rradar joins its legal knowhow with expertise in risk management, behavioural psychology and the insurance world and combines it with technology to deliver services.

He says: “Don’t be afraid to collaborate and share knowledge, and recognise the advantages that technology can bring.”

Turner at Taylor Vinters agrees; he says one of the greatest opportunities for innovation in the SME sector is collaboration. “We can’t do it alone and we



don't need to."

And just because you're a small firm doesn't mean you can't collaborate on the same level or with the same tech companies and startups as bigger firms.

Taylor Vinters has partnered with legal tech company ThoughtRiver. This was driven by a desire to stay in the conversation around change in the legal sector, Turner says.

"Some of the larger firms are now developing ThoughtRiver much more quickly than we are, but we don't care. Rather, it's great because we're learning all the time – seeing how they operate and taking ideas from that."

But, he adds, the firm has learned a lot from the innovations its clients perform as well – they're constantly sharing, licensing out software for others to develop, and so on.

"Lawyers on the ground are uniquely placed to have a dialogue with a client about how we might do things with more value for them.

"Everyone likes to think that what they do is valuable, but that doesn't stop the possibility that it could be more valuable," Turner says.

The same is true, but different, at CFG Law – with

its combination of legal and medical professionals to strengthen its offering to clients.

Fernie adds that the firm has worked hard to develop a senior leadership team that is made up of lawyers and business services.

"We actually have someone with the title 'head of client innovation'. It arose because he was very involved in interacting with people in medicine and the support side of our business. And we wanted to further develop that area."

"When we say we work together, it's not just as a team internally – we also identify those who are involved in helping our clients outside our remit."

And, of course, internal collaboration is a must, but it can manifest itself in different ways in the business. For example, Hodge Jones & Allen set up an in-house call centre to deal with the volume of queries it regularly receives.

Joshi says: "In December alone, our housing team had 600 inquiries. Just one team. We've been able to maximise on all of those opportunities because we looked at our processes from start to finish."

DEVELOP

The nature of business is that it will change. Change is the only true constant – no matter how much people try to resist. So for SME law firms to continue along a path of success and growth, they must be able to adapt and further develop their practices.

It has been said time and again, but it's easy to get lost in the day to day, which turns into years of work but no progress.

Hodge Jones & Allen have gone through a lot of change and reshaping in the last year to get itself out of a potentially dangerous cycle.

LPM FIRM FACTS

Taylor Vinters

Revenue: £20m

Corporate status: LLP

**100 fee earners,
150 total staff**

**Offices: London, Cambridge,
Singapore**

LPM FIRM FACTS

Hodge Jones & Allen

**Corporate status: Limited
company**

**90 fee earners, 220 total
staff**

Offices: London

LPM FIRM FACTS

rradar

**Corporate status: Limited
company**

110 total staff

**Offices: Hull, Leeds,
Glasgow**

“Some of the larger firms are now developing ThoughtRiver much more quickly than we are, but we don't care; it's great because we're learning all the time, seeing how they operate.”

Ed Turner, managing partner at Taylor Vinters

**LPM FIRM FACTS****CFG Law****Revenue: £4.5m****Corporate status: Limited company****46 fee earners, 75 total staff****Offices: Stockport, Cheadle****LPM FIRM FACTS****Ellisons****Revenue: £13m****Corporate status: Partnership****97 fee earners, 200 total staff****Offices: Colchester, Chelmsford, Ipswich, Tending**

The firm had had issues with succession planning, Joshi explains, and so she looked at several options and came across the employee ownership model as a solution. Lo and behold, HJA became the first UK law firm to fully adopt the model.

She says it was the most innovative thing she's done and opened doors for further growth and development.

On the operational side, the firm started its paper-light journey three years ago. "We set up a working party of representatives across the firm to ensure our firm-wide rollout would work across 10 different revenue streams. And it was a huge success."

Joshi says this year also has some key projects in the works. "We're piloting a paper-light project with the Legal Aid Agency, which has traditionally been very paper-heavy, but they recognise the cost savings that HJA has made and want to develop that for the future of the legal profession."

Creating efficiencies, it seems, will always be on the minds of business leaders. And for a lot of legal services it doesn't matter too much whether the work is being done for a charity or for a fast-growth company; some processes don't need to be done from scratch all of the time.

The quality and compliance team at Ellisons is responsible for "process re-engineering," says Turner. "It sounds very grandiose and they do a lot of important work for the firm in terms of efficiency. They look at existing business processes and try to streamline those to make us work better and more effectively."

Smarter working is an important element of innovation. He says that in the last 18 months, Ellisons has strengthened its remote capability and

“ We’re piloting a paper-light project with the Legal Aid Agency, which has traditionally been very paper-heavy, but they recognise the cost savings that HJA has made and want to develop that. ”

Vidisha Joshi, managing partner at Hodge Jones and Allen

mobile working.

"It's a big deal that lawyers can either sit down with clients or go home and be able to access information as if they were at the office."

And Turner at Taylor Vinters agrees: "Any law firm that's not already paper-light and working digitally ought to be getting there because it will unlock a whole world of potential for the client."

"If you can effectively use the cloud, integrate systems and not have to rely on physically scanning documents to work on them, you're less restricted as a business. You can engage and innovate more."

A great example of that potential for engagement, Gallen at rradar says, is that firms can then put technology and capabilities in front of the client.

grace, rradar's artificial intelligence solution, was built to understand the questions and language used by clients and give answers in plain everyday language.

"You can ask a question around process, a legal issue, topic or client-risk area, and all of our knowledge and data is put inside grace so she can



provide answers and templates and information through infographics, podcasts, and webinars,” he says.

Technology is to be used as a tool. It will not replace lawyers and lawyers shouldn't have to worry about learning to code, Gallen adds. It goes back to collaboration – there are experts out there for a reason.

INSPIRE

Clients are a clear area of inspiration for law firms to innovate – but where else can SMEs go to leverage ideas and be inspired to change?

Turner at Ellisons says inspiration can potentially come from all sectors. “Certainly there are more parallels within the wider professional services sector. But if we see something that we like or that intrigues us and that we'd like to explore further, then we would follow it.”

Also, his background in IT means that he has a lot of links and networks that can be used to leverage new ideas.

“It wouldn't matter whether it was an airline or a

retail company – there's always potential for their learnings and projects to be sifted and applied at Ellisons.

“I'm lucky that I have networks to bounce ideas off. Sometimes having a conversation with a like-minded individual, who's not at a law firm, can be very powerful,” Turner says.

Gallen at rradar is inspired by art. “Most people think that law and tax are boring. So, I look at moments of entertainment and take insight from the things that bring people pleasure in life.

“How can I communicate what I know in rhyme, with colour, music and a bit of flair? If people can find interest in it, they'll engage and understand it better.”

Another key area Gallen is inspired by is parenthood. And he's learned some particularly insightful lessons that come with being a parent of a child with severe disabilities.

“In many respects, a lot of the medical professionals I came across acted like many people in legal. It was all very matter-of-fact – textbook says your son won't do this. Instead of what I could do as a parent.

“It was the parent communities that were the most beneficial – people with positive attitudes, who wanted to find a way. Human life succeeds when you've got the right attitude. It's exactly the same for law firms. I love the law, but we've got to be smarter about how we deliver it and help people use it.”

Innovation is about hard work, unshakeable belief and the stubbornness to see things done, Gallen says – otherwise it's just a pleasant word for conversation. **LPM**

“How can I communicate what I know in rhyme, with colour, music and a bit of flair? If people can find interest in it, they'll engage and understand it better.”

Gary Gallen, founder and CEO, rradar



Providing IT and telephony solutions to law firms for 30 years

- Bespoke managed services
- Extensive legal software knowledge
- On-premise, cloud and hybrid solutions
- Microsoft cloud platform specialists
- GDPR and data security
- Hosted VoIP and Unified Communications

TELEPHONE 0333 222 4334

EMAIL enquiries@quiss.co.uk

www.quiss.co.uk

QUISS CAN HELP

Qworks
Bespoke managed services

Qcloud
Hosting platform solutions

Qvoice
Converged telephony

Qshare
Business Productivity Solutions

Specialist marketing services for Legal

Accesspoint

Media Services

Where strategy makes the difference

How visible is my Law Firm in Google?



Read our Q&A
in this edition to
find out

We can improve your firms visibility in Search Engines

Contact us on: 0203 189 2645 www.theaccesspoint.co.uk/media

Accesspoint

Your gateway
to successful
marketing

Wavelength Law

Defining legal

What does it mean to be a legal engineer? The team at Wavelength Law discuss disruption and new law, Kayli Olson reports



The last few years have seen a rise in the use of legal and technology to drive better legal service delivery and solutions to clients. New entrants in the market set out to redesign how legal works and that's just what legal engineering firm Wavelength Law is all about.

Peter Lee, CEO, together with Drew Winlaw, COO and chief legal engineer, co-founded Wavelength Law in early 2016.

Lee says: "At the time, we felt that there was a tipping point in the industry where many organisations needed a combination of legal, tech, data and design skills to solve their complex problems – these are what we now call 'legal engineering' skills. We also knew that many point legal technology solutions were approaching a level of sophistication and maturity that meant they could be stitched together to powerful effect."

Law firms normally try to solve their clients' problems using the tools traditionally available to them, Winlaw says, which are often legal skills and expertise. "But there was a big opportunity to solve problems using a different set of tools – such as data science techniques, data structures and creative thinking."

Dr Ben Gardner, Wavelength's chief scientific officer, says that the legal sector has a lot in common with other knowledge industries and could learn a thing or two from how they use technology and data to redesign their processes.

"There's a change in mindset that occurs when you start enabling people to extract structure from their unstructured data and subsequently do something interesting with it. It requires us to think about things as digital entities.

"When you realise digitalisation means you are no longer constrained by the limits of the physical world then you can start to explore the new

opportunities that law firms inherently just don't see."

Wavelength sits in the interface between law and data – Lee says they're able to break down the language of technologists and lawyers, remove friction and facilitate business in the legal sector.

A DIFFERENT WAY

The firm's business model is the reverse of most technology business models but not the same as a traditional professional services firm, says Winlaw.

"We lead with highly technical professional services, including consultancy, building proofs of concepts or actual legal services. And we sell subscription-based data services from the solutions we've built," he says.

Quite early on, Lee says, we decided to become a regulated law firm, which had some significant cost consequences and restrictions to consider around confidentiality and procedures but is also a differentiator and allows them to offer new solution. The fact that we are a law firm also gives clients confidence and reassurance, he says.

"We took advantage of the relatively new legal services act and set up as an alternative business structure."

"An important element of all our work is sympathetic design, so that the solutions we build work in the real world."

Peter Lee, CEO, Wavelength Law





This allowed them to create a share option scheme, giving staff an equity stake in the business and a sense of ownership – which, Lee adds, is quite different from his past experiences working in law firms.

Both Lee and Winlaw worked in other roles before they trained as solicitors and found that the way the legal market traditionally worked was “completely bonkers”. They were inspired to develop a new business model to, effectively, disrupt the market – by becoming the first regulated legal engineering business in the world.

There are currently three non-executive directors, and the team of 25 people across offices in Cambridge and London only continues to grow. Wavelength’s main client base is made up of other law firms, in-house legal and business teams. And most of its work is not about putting a single solution in place – it’s a blend of different products doing different things with data.

Lee says: “We build data solutions for law firms, and most of our work with in-house legal teams is focused around operational efficiency – so legal operations, like triage process and workflow management. An important element of all our work is sympathetic design, so that the solutions we build work in the real world.”

The third element of our work, says Winlaw, is R&D, where we think of completely new ways of doing work using the data that’s available.

Dr Gardner adds that one of the firm’s biggest challenges has been to educate the market. “I invest quite a lot of time in speaking engagements, writing white papers and really doing our own R&D to generate awareness. There’s so much that’s possible if the legal market just opens up.”

Lee adds that, in the last year, the conversations have moved away from ‘how do I use AI’ to talking to people about their real problems and how they’re tackling those.

“And there are more exciting and complicated challenges just coming across our desks now that are really good for our team to get their teeth into.”

Being open and honest is a big part of how Wavelength works, he says. “We’re incredibly proud to be disrupting the legal sector and creating new types of career paths, and really get excited about practising law in a different way.

“And although legal engineering may sound niche to some, the addressable market is huge, and there are many jurisdictions and parts of the sector that could use a shake up.” **LPM**

From left to right: Dr Ben Gardner, chief science officer; Peter Lee, CEO; and Drew Winlaw, COO and chief legal officer

LPM FIRM FACTS

Wavelength Law

Corporate status: ABS

25 total staff

Offices: London, Cambridge



LPM CONFERENCE

2019 UPCOMING DATES

09:00-09:45 Breakfast and registration

09:45-09:50 Chair's opening remarks

Rupert Collins-White, LPM

09:50-10:10 Delegate ice-breaker and speed networking including an introduction to our first ever practice management awards, in association with the ILFM
Rupert Collins-White, creative director, LPM Magazine

SESSION ONE: INDUSTRY CHANGE AND THE CLIENT

10:10-10:30 Morning keynote

Are your fee earners underestimating, discounting or overservicing clients and therefore not getting paid what they're truly worth?

Vanessa Ugatti - The True Worth Expert, coach, trainer, speaker, author, Finalist 2014 Venus Awards - Influential Woman of the Year

10:30-10:50 What technologies are changing the shape of legal services?

Early results from LPM's annual Legal IT landscapes research revealed
Rupert Collins-White creative director, LPM magazine

STREAM SESSIONS - DELEGATES WILL PICK ONE STREAM TO ATTEND

10:50-11:20 Stream 1: What lessons can be learnt from outside the legal sector to improve your clients' experience?

- How can law firms learn from retail and online business about client engagement?
- How failing to understand your customer experience is losing you money
- Designing your shop window: service focused ways to differentiate your firm
Bernard Savage, director, Tenandahalf

10:50-11:20 Stream 2: How new firms in the market are revolutionising the way clients seek legal advice

Gary Gallen, founder and CEO, rradar

11:20-11:50 Networking refreshments break

SESSION TWO: FINANCE FUTURES - DELEGATES WILL PICK ONE STREAM TO ATTEND

11:50-12:20 Stream 1

Panel: Mergers and consolidation

- Will this be the only viable way to invest in and grow your firm?
- To what degree will SME firms engage in consolidation over the next five years?
- What are the criteria for a successful merger?
- What are the alternative ways to finance growth?

*Led by: Kayli Olson, editor, LPM Magazine
Simon Goldhill, founder and director of strategy, Metamorph Law*

Andrew Roberts, director, Ampersand Legal, chairman, Association of Law Firm Merger Advisers (ALFMA)

11:50-12:20 Stream 2: Are law firms in denial about their profitability?

- Managing cashflow: are your partners treating your accounts like a bottomless pit of money?
- Why a strong managing partner needs to listen to the finance agenda
- Practical ways of equipping your employees with the right kind of financial knowledge
Tim Nash, CEO, Edwin Coe

12:20-13:20 Networking lunch

13:20-13:40 Afternoon keynote

- Early engagement with your bank is key to your success: here is how
- How to ensure your finances are in order - that difficult debt communication
- Have you thought about your succession planning and how your banking partner can help?
- Can recent listings be a source of capital raising inspiration?
Neil MacDonald, head of professional services, Metro Bank

TECHNOLOGY FOCUS - DEEP DIVE ROUNDTABLES

Join intimate roundtable discussions, learning about vital law firm management issues

13:50-14:50

Roundtable 1 Measuring the value of investment in technology

Host: Karen Butler, sales manager, Converge Technology Specialists



LPM WEST

24.04.19

DoubleTree by Hilton, City Centre,
Bristol

LPM NORTH

15.05.19

The Met Hotel, Leeds

Roundtable 2

Not all cloud technology providers are made equal – how to demystify the cloud and create an approach that is right for your firm

Host: Nick Francis, international growth, Clio

Roundtable 3

Riliance risk outlook 2019

Host: Bethan Mayman, head of risk and compliance, Riliance

Roundtable 4

Client collaboration

Host: Kirsten Maslen, head of SME law proposition, Thomson Reuters

Roundtable 5

Approaching case management software development

Host: Robert Sanderson, managing director, Landmark Information Group/Ochresoft

Roundtable 6

How you can make hybrid cloud work for you

Host: Martin Palmer, enterprise business manager, Pulsant

Roundtable 7

Inefficiency for opportunity: a toolkit on how to assess your record management process and security

Host: Natasha Rawley, the file queen, ADDS

Roundtable 8

Getting the most from flexible and mobile working

Host: Sami Ahmed, senior sales manager, DPS Software

Roundtable 9

Case study: How to exercise data-driven decision-making and improve performance

Host: Graham Moore, managing director, Katchr
Jamie Abrahams, operations director,

Harold Benjamin Solicitors

Roundtable 10

The Envision methodology – why and how, not just what

Host: Brian Coventry, CEO, Symphony

PEOPLE PERFECTION

15:00-15:20 Engaging your employees through employee ownership

- Successfully attracting and onboarding new employees
- The importance of collaboration and communication as a driver for retention
- Fostering a culture of reward and recognition
- Identifying and developing future leaders
- Measuring success

Lucy Palmer, HR director, Stephens Scown

15:20-16:10 Panel: The future workforce

- Graduate trainee programmes
- Including employee mental health and wellbeing in training programmes
- Training managers to deal with employee health
- Why the debate shouldn't be all about flexibility
- Has/can flexibility help with improving the bottom line?
- New platforms and inroads for legal advice

Lead by: Sara Duxbury, business psychologist and head of commercial, Carter Corson

Panellists:

Mary Bonsor, co-founder, F-LEX
Henry Coates, bookings assistant, F-LEX
Alexis Lane, partner and employment solicitor, The Head Partnership

16:10-17:00 Drinks reception

2019

LPM

PRACTICE EXCELLENCE AWARDS

LPM's inaugural awards celebrate excellence in legal practice management, innovation and investment in people in the UK's SME law firms



CATEGORY ONE
PEOPLE AND ENGAGEMENT



CATEGORY TWO
**SERVICE DELIVERY
EFFICIENCY/INNOVATION**

ilfm

The Institute of
Legal Finance
& Management



Do you need a next day delivery that's guaranteed?

**Your documents are sensitive,
urgent and business critical.**
Our tracked services provide
delivery reports, online tracking
in real-time, and with next-day
delivery by 9am as standard.

For more information
email exchange@thedx.co.uk
or visit dxdelivery.com/exchange



SHAKEN, NOT PERTURBED

30 INDUSTRY INTERVIEW

Mark Garnish, chief technology officer at **Tikitt**, discusses the potential, transformative impact of “Project Snowball”

Jon Whittle, market development director at **LexisNexis**, lays out the importance of moving to a client-centric culture for the future of SME firms

Managing director **Andy Michael** and head of cloud solutions **Paul Tozer** at **Quiss** talk about the importance of investing in, and protecting, the cloud



SNOW AND TELL

Investment in new architecture for Tikit's flagship PMS Partner for Windows offers firms multiple options for transforming client services, and a much more agile, flexible and productive operational future, says chief technology officer Mark Garnish

A lot has changed for Tikit since its flagship case and practice management system Partner for Windows (P4W) first hit the shelves in 1998 (the same year, incidentally, that one Google was founded by students Larry Page and Sergey Brin). Today, a team of some 75 Tikit developers have busy heads down, and the fruits of their labours continue to arrive with each new release.

But few Tikit transformations over the years can have created quite as much buzz as the mysteriously named 'Project Snowball', unveiled to both 20-year-loyal and brand-new clients at its National User Group conference back in November 2018.

What could it possibly mean? LPM didn't have too long to wait, as the company's chief technology officer Mark Garnish took to the stage to lead us through the detail and explain exactly why Project Snowball will make a striking strategic difference to the efficiency and innovation efforts of every firm in the room. ('Snowball', incidentally, has no deep symbolism – it was simply a plan concocted in the depths of winter, Garnish laughs).

API ON THE PRIZE

Tikit has always sought to embrace the changing ways that law firms operate, from working more collaboratively with their clients to the acceleration of a 'cloud-first' principle. But the latest picture of progress

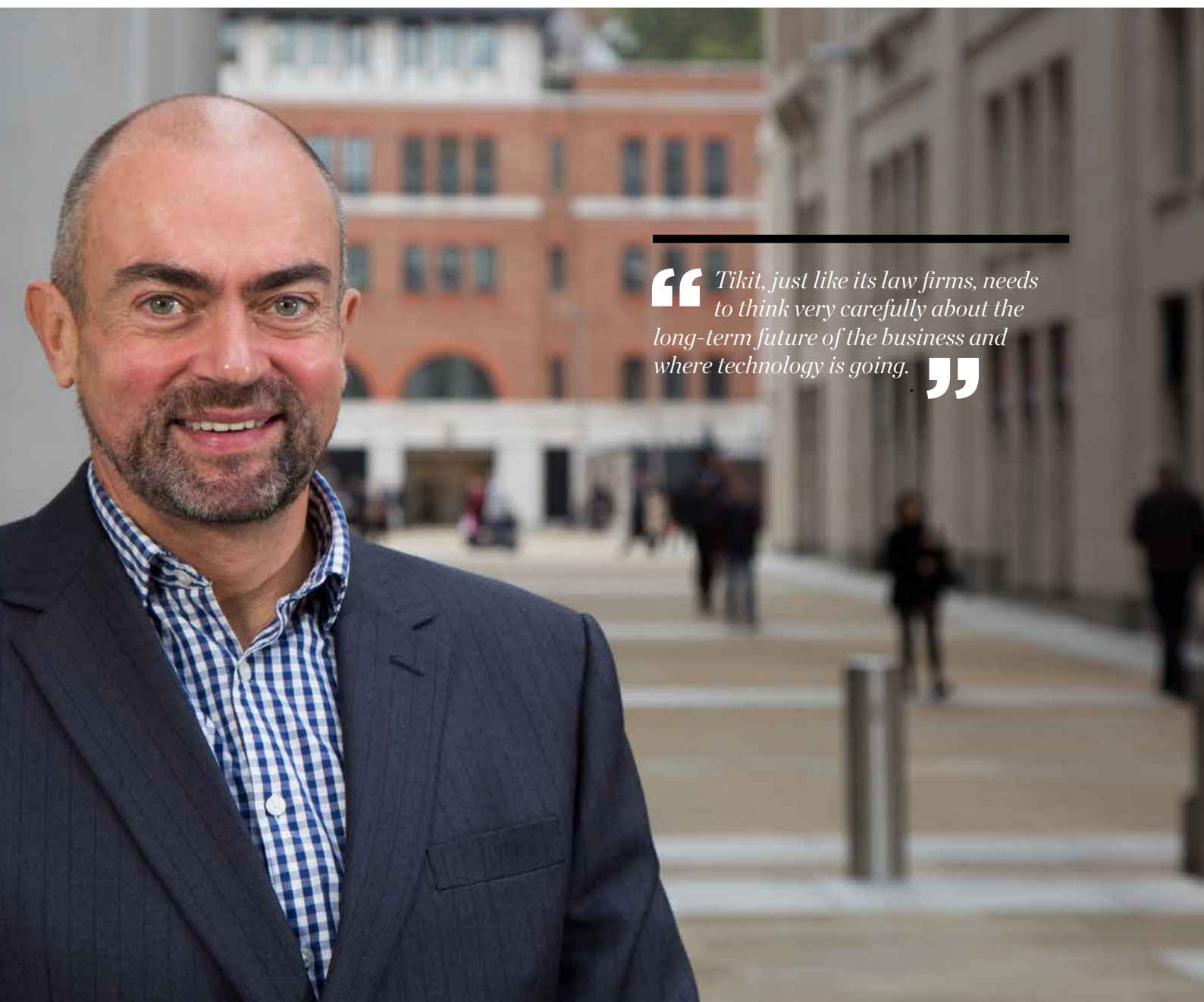
Tikit saw in the industry called for a significantly more ambitious transformation.

Garnish explained to the audience in his keynote presentation: "Tikit, just like you, needs to think very carefully about the long-term future of the business of law and where technology is going. It's imperative that Partner for Windows remains as effective and popular for the lawyers who will be using it in 10 years' time as it is with all of you today. That means we need to evolve our software to reflect how firms and lawyers want to develop and access innovative new services in the future."

Right at the heart of Snowball, therefore, is the introduction of a comprehensive REST (Representational State Transfer) API. In essence, this allows other developers to integrate and communicate with the P4W system, which gives law firms using it a lot more options.

"It's a standard development interface, but

“ *The design of Project Snowball aims to support up to half a million users, as we know this platform needs to be super-secure and resilient, as well as scalable* ”



“Tikit, just like its law firms, needs to think very carefully about the long-term future of the business and where technology is going.”

ABOUT THE SPONSOR

Tikit is a leading provider of technology solutions and services to legal and professional service firms.

www.tikit.com

tikit

the big difference is that if you want to create a new client, you can now create that client from anywhere. Tikit is also using the REST API for its own development of P4W, ensuring that any application interfacing with the database does so in exactly the same way,” explains Garnish.

The introduction of the REST API will give users a choice of interfaces, including ‘fat client’, web application, mobile and third-party integration to the ecosystem.

In other words, this is about the potential for enabling ever more productive working patterns, through managing to do a greater proportion of the firm’s workload on the move. We know that demand for ‘agile working’ is on the rise among a legal workforce that can see it working elsewhere – and firms are also realising that being more mobile can make them more efficient as fee earners embrace new working patterns and seek a better work-life balance.

OPTIONS ARE OPENING

In another major part of the Snowball initiative, Tikit have announced that Partner for Windows will soon be available in the cloud. Tikit remain committed, however, to supporting Partner for Windows both on-premises and in the cloud, and have architected Project Snowball to support both.

“The design of Project Snowball aims to support up to half a million users, as we know this platform needs to be super-secure and resilient, as well as scalable,” Garnish explains.

Indeed, he has ended up with a 120-page technical architecture document for users to digest and ultimately endorse.

“On-premises, there’s not much visible change – but in the cloud we’ll have a new architecture. Rather than one database covering everyone, each user will have their own. There will be a shared set of API services, which will extract the data from the



TIME ARTISTRY

Offering a choice between managing P4W workflows either on-premises or in the Microsoft Azure cloud follows a well-trodden path for the Tikit leadership team. Timekeeping system Carpe Diem paved the way for this level of flexibility, anticipating a growing number of firms moving to a 'cloud first' mindset to increase organisational agility over the years.

But of course, Carpe Diem needs to seize the day as does its younger relatives. The user group heard there are also some significant productivity improvements in store for this product in 2019.

"We're committed to further action to allow Carpe Diem to better serve those law firms committed to legal aid work," says Mark Garnish. And there's also something special for everyone. The latest release includes the ability to auto-populate time fields from recorded notes – or even scribbled handwritten ones that have been deciphered.

"We can all debate the precise meaning of the words artificial intelligence, but one thing for sure is that this development applied to recording notes is really new in the market," says Garnish.

And ultimately, this 'intelligent time' concept is still focused on the end goal of capturing more data on the move, thus driving both the individual's productivity and their business's profitability.

“ *If you've just finished and deployed a fantastic new workflow, rest assured that will continue to be supported just as it is now. We aren't forcing clients to switch to a different product or a different interface unless they want to. We will support firms to move seamlessly to the new architecture.* **”**

Garnish says: "We're making this available so that we can receive comments and ideas from any of our clients before the final production releases are ready. That way our clients can directly influence the development of the product."

THE USER CASE

But Garnish stresses that in terms of user experience, change will be incremental over time rather than a big bang, making adoption easy. For example, they can drive P4W workflows directly from the firm's own intranet rather than through the current application if that makes more business sense. "Project Snowball is about some really important future-proofing of the underlying architecture, but the end-user experience can be carefully managed."

Meanwhile, another important aspect of 'no change' for law firms reading this will almost certainly be the price tag. "Firms' existing investments in P4W system are 100%, cast-iron protected," says Garnish.

"If you've just finished and deployed a fantastic new workflow, rest assured that will continue to be supported just as it is now. We aren't forcing clients to switch to a different product or a different interface unless they want to. We will support firms to move seamlessly to the new architecture."

He says, in addition, there's no additional license cost to upgrade to the new version of P4W.

"We've never charged for upgrades or new versions to date, and we're sticking to that principle – there are few of our competitors that can say that."

Whatever their individual priorities for growth and change, Tikit looks forward to taking firms with them on this forward-looking, future-focused journey. **LPM**

database and return it to the user."

He continues: "A fat client may be using some of the API services, but you wouldn't notice it at all." And the really big expected win is access via all possible web browsers.

The first of these APIs and web-based interfaces will be ready to roll in November 2019. "Interested early adopters can have access before that, and we'll then invite all clients to upgrade to the new version of P4W, complete with the set of APIs."

Tikit has also announced that a fully functional demonstration site will be available for all P4W users to access from the end of March 2019.



WISDOM FROM THE CROWD

How did Project Snowball sound to the clients represented at the 2018 user group?

Stuart Taylor, head of IT at Osbornes Law (and a user of Partner for Windows since 2001), said he was very enthusiastic about the announcement.

“It strengthens P4W’s position as the market-leading practice management system, particularly as I believe the way legal services will be consumed in the future might change dramatically.

“There is a noticeable desire in the world today to do everything via a mobile phone, with as little human interaction as possible. The new API that is the core part of Project Snowball will more easily allow Tikit, or even the practice, to develop mobile apps and websites to allow this to happen.

“It will also allow more agile working solutions for fee earners, as they won’t be tied to the remote connectivity solutions we have today. They will be able to interact with P4W from either web browser or mobile app, giving better access to their clients’ data as well. In summary, an excellent enhancement to what is already a great PMS system!”

Jamie Abrahams, operations director at Harold Benjamin Solicitors, also saw the value – citing internal collaboration between departments and fee earners as another efficiency driver that should feel the benefit.

“Project Snowball is a positive statement from Tikit, and I believe it will allow for better integration with true cloud technologies and create improved agile and collaborative working methods for our practice.”

Finally, Liam Bramwell, IT services administrator at Keebles, singles out the more straightforward integration work itself.

“We already integrate directly with P4W a great deal. However, it’s very time-consuming work to do so. With the arrival of Restful APIs we’ll be able to perform proper integration without custom code and always use the latest specification.”

Keebles was one firm that agreed to take part in a proof-of-concept for the development, using an intranet page that it uses for posting slips. It was an encouraging experience.

“We can see that restful APIs will enable us to implement our own updates for ourselves. We also have other suppliers approach us saying they want to integrate, but need a REST API first. So, now they can.

“More generally, the fact that this is part of a clear long-term plan should give firms confidence in an investment that incorporates all the new ways we know people want to work. If firms were thinking about changing their case management provider, now might well be the time to do it.”



CULTURE MATTERS

Jon Whittle, market development director at LexisNexis, says in order for SME law firms to survive in the future marketplace they need to have a client-first culture

Creating a client-first culture in law firms is always going to be challenging because there's often a lack of understanding in the lawyer-client relationship, says Jon Whittle, market development director at LexisNexis.

"There's a huge journey that both lawyers and clients are taking. In some law firms we've seen a definite shift in attitude, attention and perception – they're behaving more like service providers."

Yet according to LexisNexis Bellwether Report 2018: The Culture Clash, only 47% of respondents listed client-first culture as a top priority for the future success of their firm.

Whittle says there are some relatively small, practical things that law firms can do to succeed – the most obvious, yet often overlooked, is to genuinely listen to what clients are saying.

"Don't assume that what you want is what your

clients want. Put their priorities at the top of your list, not the other way around."

NO COMPROMISES

Retaining clients has become a major challenge, as reported in the Bellwether report. It found that 76% of respondents believe that client loyalty and retention is a significant challenge – which is increasing in importance year on year.

Clients are increasingly becoming more demanding, Whittle says, and in a world where price-sensitive consumerist behaviours are being felt by all industries, the time has come for the legal profession to recognise the importance of being client-centric.

He mentions that Chad Burton, CEO at CuroLegal, stated that firms demonstrating client-first cultures share some key traits – the importance of solid intake, internal firm processes,

effective team communication, constant client communication, relevant technology and competitive pricing. They also share a focus on providing high-quality legal advice that clients need, and genuinely place the customer at the heart of their firm.

"While the nature of the SME market is that some firms merge or simply fade away, many of the new entrants are very different," he says – they're more entrepreneurial and focused on what's best for the client.

"The progressive firms coming into the market are the ones producing models backed by a genuinely client-centric culture."

And that's not all, he says. They're embedding themselves into other businesses' workflows, so that their clients get an experience that's married together, whatever it might be – professional services, accountancy, legal work or employment services.

The client experience is much more holistic, which is better for retention, Whittle says.

Of course, not every law firm may feel that they can change the way they work – however Whittle believes they should try.

"The imperative to change is quite challenging to some. But there are two big shifts in the market that will lead firms to consider how they do business."

Whittle says the first big shift is in the providers – new entrants are creating disruption, and competition now comes from non-legal providers. Additionally, more work is now being undertaken by in-house solicitors.

The other shift comes from clients. Whittle believes that client attitudes toward legal services or, more appropriately, services in general, has changed.

"Clients are consumers, and their behaviours are changing more radically. They're more digitally enabled and more informed thanks to Google, with certain expectations around customer experience."

Whittle says that quite often lawyers focus on 'how can I do what I've always done, faster?' instead of 'how can this help me deliver something different for my client, efficiently, and

“ *The progressive firms coming into the market are the ones producing models backed by a genuinely client-centric culture.* **”**

also demonstrate that I'm creating value to build client loyalty?"

"SMEs need to think about output rather than input, as our research tells us that clients value outputs. And they'd find that this could make the shift for the better."

AREAS OF ATTACK

SME law firms need a change, but where to start? Whittle says there are four main areas of attack for firms.

As discussed, it should be no surprise that culture is the biggest piece. "A lot of law firms have processes and cultures designed to manage legal process rather than to manage client outcomes.

"Having a solid client-centric culture will ensure that the lawyer client relationship will be built on a solid foundation."

Technology is the next part. He says many firms talk a good talk around how technology can help them but don't really use it or aren't applying it with the client in mind.

"If clients value outputs, then why not invest in legal technology like LexisPSL or Lexis Draft that enables efficiencies.

"Listen to what clients want and spot where the barriers are in your organisation. Then you can truly see where technology can speed up your processes and improve how you work."

Whittle says the final piece is to be receptive to change – the market adapts and changes all the time against a backdrop of regulation designed to support clients.

Feedback from clients can only help when change is set in motion in the firm, and it must be measured against your intended goal, he concludes. **LPM**

ABOUT THE SPONSOR

LexisNexis combines information, analytics and technology to deliver essential insights, informed decisions and better outcomes.

www.lexisnexis.co.uk/businessoflaw



AZURE FUTURE

Managing director Andy Michael and head of cloud solutions Paul Tozer at Quiss discuss being in control and secure with Microsoft Azure

It doesn't matter how large or small a law firm is, cloud adoption comes down to clients and governance. Protecting client data will always come first.

"When Microsoft implemented the UK regional datacentre, that was really a tipping point, from our perspective. Law firms could now actually start to adopt the cloud model with a bit more assurance about the quality and security of their data," says Andy Michael, managing director at Quiss.

"Lawyers are lawyers," he says. "I don't expect them to know IT or different cloud models; that's where Quiss comes in."

VIRTUAL RECOVERY

SME law firms still hesitate on cloud adoption, whether it comes from the need to sweat an IT asset before moving on from on-premise operations, or being uninformed as to the models and pricing options available.

Quiss's head of cloud services Paul Tozer says firms can use the cloud on a true consumption model, where they only pay for what's used rather than what's provisioned.

"This speaks volumes for law firms because they want to know what their monthly fees will be and have that flexibility to adapt to changes to their practice – if they merge with another company, for example."

But, Tozer says, the biggest misconceptions about cloud that firms have is around control and security.

"When working in Microsoft Azure, users have complete change control and data management – it's all built into the system. For compliance, this is a big hit."

Azure can handle data access requests directly in its system – it will search not just within emails but also documents and other qualifications. If a firm is doing that on-premise it can be a very difficult process, he says.

Michael says: "Using Azure means that you're

replicating your machines, virtually, into Microsoft's cloud, all for the purpose of backup site recovery."

And when backup is synchronised directly to a firm's systems, he says, the recovery point objective could be as low as 15 minutes – that's very disruptive to what was the old disaster recovery technology. Traditionally, someone would have to come into your space, load data into new servers and start them all up – that was looking at a 24-to-48 hour recovery time.

"If you lose your infrastructure, machines can start up inside recovery with the structure actually working out of the cloud – this is one way to prepare for a potentially big cloud migration."

But that's for dipping toes, says Tozer. As part of Quiss's offering, it can do a big bang approach to cloud migration.

He says: "We'll refresh all of your servers, infrastructure and desktops. Where traditional hosting providers use Citrix as their delivery method, we use a modern desktop approach.

"The cloud becomes an extension of your network – all of your application forms live on your local machines but you have what's called an 'express route' to the cloud servers. It just becomes another office."

And if you want to enable people to work remotely, Tozer adds, you can lift the machine off the network (hosted in the cloud), which has an always-on VPN and that user can work anywhere as they would work in the office.

SECURE IT

Security in the cloud remains a top area of concern for legal leaders. Michael says, looking at cloud security from a business perspective, no matter how a firm works, they're all connected to the internet in the same way – so who is better placed to secure that environment, your internal people or Microsoft?

"A lot of people think that because they can't touch it, it's out of their control and therefore anyone can hack it," he says.



ABOUT THE SPONSOR

Quiss provides a range of innovative business support solutions for law firms of every size across the UK – shaping technology to help them achieve more.

www.quiss.co.uk

Quiss
Excellence through experience

Tozer agrees: “Microsoft employs a lot of security engineers and their intelligence comes from not only Office 365 but also Xbox live, Hotmail, Bing, MSN and so on. They have multiple systems and people working on threat detection and prevention.”

He says the SME market, by contrast, can only afford to hire a handful of people for IT in-house, if any at all. And those teams are more geared toward the day-to-day running of IT and usually aren’t equipped to focus on security in the same way.

It’s also important to understand that all communications between end-user device and your server are encrypted – it’s not easily hacked, says Michael. “It would take NASA or the CIA to sit and run algorithms for weeks to find out that you emailed someone something.”

And it’s not just encryption, Tozer says. There are added features such as two-factor and multi-factor authentication that can be switched on – really increasing security more than you could

on-premise and a whole lot less painful to implement.

The same goes for managing the machine while it’s out of office. “Microsoft Intune can manage a device when it’s not on the network, so if you lose a laptop, it can be wiped remotely. Laptops are also encrypted using BitLocker. So there are multiple layers and opportunities for further security,” he says.

Michael adds that some people just don’t like the idea of the cloud, however they’re probably using it already.

“Almost everyone is using cloud computing in one form or another. It’s part of our lives now – how we use it is more important than the fact that it exists. And the benefits that it will bring in the future are going to be determined by how we use it.”

It’s changing fast. Michael says there are many features being introduced in Azure Logic Apps. There is so much of it coming down the line, and it’s all designed to make firms’ lives easier. **LPM**

EXPENSE STRESS

A financial squeeze can hurt businesses not just directly, but their employees, too. And, as new reports suggest, work-related costs and poor expense procedures can be the cause of anxiety



Being on the road for work is not uncommon for employees in the legal sector, but it can be a stressful experience. How employers handle their workers' expenses can have a huge impact on employee wellbeing, according to a new study by Censuswide on behalf of Allstar Business Solutions.

The majority of legal sector workers who travel frequently end up between £50 to £200 out of pocket, a financial burden which prompted over a third of such employees to think about looking, or actually look, for a new job. And no wonder: for a worker on the average UK salary of £29,009 a year, this works out to between 8% and 30% of their disposable income each month.

When it comes to forking out on behalf of their employers, 32% used their own bank card to pay for expenses, with fuel and parking fees the biggest costs on the tab (66% and 36% respectively). And, when asked what they found most annoying about travelling for business, 28% of workers revealed that it was having to use their own money to pay for expenses.

Of those who said they never claim back all their expenses, 43% of the respondents said that the reason for this was that they struggled to keep hold of paper receipts. Could there be a better way for employers to put their money where their mouths are on wellbeing?

Half of legal sector employees working for SMEs have endured financial hardship after shelling out for on-the-road work expenses.

35%

of legal sector workers have admitted to consider changing their job as a result of an employer's on-the-road expense procedure.

42%

of employees want their bosses to take more responsibility for paying expenses before or during their trip, with 25 million UK employees affected by money worries while at work.

EMPLOYEE FINANCIAL WELLBEING INDEX

Money worries	55.6
Budget and planning	48.8
Debt	67.7
Protection	42.5
Savings and investments	54.1
Retirement planning	50.3
Properties and mortgages	61.2
Tax	48.5
Overall index score	53.6

This Index assesses the financial wellbeing of UK employees across the seven key areas of financial health and reveals the average score for UK employees stands at just 53.6 out of 100 – highlighting the urgent need for action.

Organisations are already feeling the strain from the lack of financial wellbeing on multiple fronts including: reduced productivity (22%), loss of talent (22%), and higher healthcare costs (13%).

Source: Opinium November 2018 research on behalf of Close Brothers Asset Management

Source: Censuswide September 2018 research on behalf of Allstar Business Solutions





ONE-DAY CONFERENCE

THE ONLY EVENT FOR LEGAL PRACTICE MANAGERS

Legal Practice Management conferences are the must-attend events for everyone in practice management from SME law firms

www.lpmmag.co.uk/conference

LPM WEST 24.04.19

DoubleTree by Hilton
Bristol City Centre
Redcliffe Way
Bristol, BS1 6NJ

LPM NORTH 15.05.19

The Met Hotel
King Street
Leeds, LS1 2HQ

2019



The Institute of
Legal Finance
& Management

LPM

PRACTICE EXCELLENCE AWARDS



CATEGORY ONE
PEOPLE AND ENGAGEMENT



CATEGORY TWO
SERVICE DELIVERY
EFFICIENCY/INNOVATION

ENTER NOW

www.lpmmag.co.uk/awards2019

EMAIL: KAYLIO@LPM MAG.CO.UK



E C L I P S E

Part of Capita Plc

25,000 people can't be wrong

Eclipse's Proclaim system is the solution of choice for 25,000 legal professionals in over 1,000 organisations. Proclaim encompasses Practice, Case and Matter Management, and is [endorsed by the Law Society](#).

From new start-ups to industry heavyweights, Proclaim is the system of choice for forward-thinking law firms.

- Fully integrated Practice Management Software solution
- End-to-end case and matter management workflow processes
- Ready-to-go workflows for specific practice areas
- SAR-compliant legal accounting
- Fast to implement, easy to use

Contact us for a demonstration

01274 704 100

Email: info@eclipselegal.co.uk

www.eclipselegal.co.uk

Endorsed by



The Law Society