

JUNE 2019

# LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY  
MAGAZINE  
FOR LAW FIRM  
MANAGERS

## BOOK REVIEW

*Catherine and Natasha at  
Archon Solicitors review  
LinkedIn for Lawyers*

EXPERT  
COLUMNISTS  
AND ADVICE  
FROM PRACTICE  
MANAGEMENT

## REGION FOCUS

*What is SME law firm  
life like in the east of  
England?*



## Measure for measure

*Monitoring productivity of staff takes more than just  
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**D**o you know how productive your staff are? Considering issues such as flexible and agile working are becoming the norm, and with the importance of being able to recognise and address mental health issues in the workplace, the average SME law firm has a lot more on its plate than just well-tracked key performance indicators (KPIs). Furthermore, do the traditional KPIs even work anymore? Jem Sandhu reports (p16).

Columnist Barry Davies also weighs in on the subject. Should SME law firms make performance metrics more personable? Some musings from him on page seven.

Performance metrics not your speed? Take a trip to the east of England as we explore what it means to be a law firm in the area with our new feature series focusing on the regions (p21). I can sense themes of better work-life balance already ...

Also, if you haven't seen the news, big congratulations to LPM Practice Excellence Awards winners. Ramsdens won in the People and engagement category, and Harold Benjamin in Service delivery efficiency and innovation. Itching to know what made them shine bright in the eyes of our judges? More on the winning and shortlisted firms in upcoming issues of LPM. Until then, stay groovy.

Kayli Olson, editor  
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our Q&A on  
'making IT  
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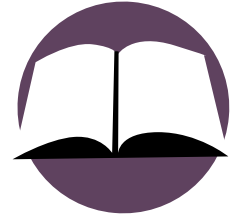
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## BOOK REVIEW

## LINKED UP



Solicitors Catherine Bourne and Natasha Koshnitsky at Archon Solicitors on the dos and don'ts of raising your profile on LinkedIn

As solicitors, we find LinkedIn is a fantastic way to remain in professional contact with a whole host of individuals who could be important for our careers.

However, from an employment law perspective this connectivity, while a very important benefit, can also cause legal wrangling – for example, when an employee breaches their restrictive covenants by having dealings with clients on LinkedIn, or brings the company into disrepute with some unsavoury messages.

While these platforms have their place in a company's marketing strategy, if a company does not have an appropriate social media policy and contractual provisions in place, it can be a real headache for employers.

On a more positive note, it is also a good idea to encourage a workforce that is well-versed in sensible social media practice, as this can pay dividends for an employer in terms of publicity and building up a brand, at no extra cost.

This book is very informative, as it contains useful tips for every level of LinkedIn user, from beginner to someone who is looking to market themselves globally through the platform.

It is a highly user-friendly and practical guide, which answers many of the common questions lawyers may have, but also opens up new possibilities and ways to use the site.

The book also contains useful examples, action plans and a best practice section to help lawyers navigate the minefield of social media etiquette. It pays good attention to detail, encouraging us to put more thought into who we connect with, how we connect with them and how those relationships should be managed within the forum.

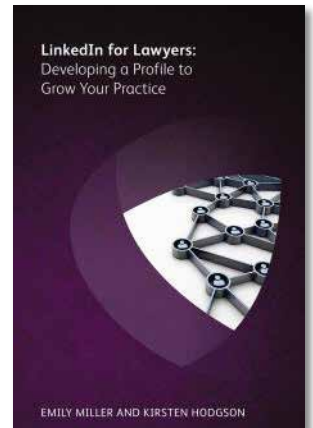
There is information on how to customise your initial message to potential connections, and some helpful dos and don'ts for online behaviour to remember along the way.

The book covers important areas, such as privacy settings, but also deals with more unusual and interesting tips.

In one memorable example, it covers how to create engaging and appropriate content, as one might expect, but also goes one step further and considers the impact that the layout of the content has on the viewer. In this particular example, the book looks at a study which tracked participants' eyes as they reviewed various LinkedIn and other social media profiles, to see which parts of a profile page viewers spent the most time looking at.

In light of the data from the study, it then gives pointers on how to arrange a profile to maximise the impact of areas that the owner wants to emphasise.

Despite being short and succinct, the book still manages to provide a comprehensive look at LinkedIn and its enormous potential. **LPM**



**LinkedIn for Lawyers:**  
Developing a Profile to  
Grow Your Practice by Emily  
Miller and Kirsten Hodgson

**Publisher:** Ark Group  
**Publication:** October 2015  
**Price:** £50



*It pays good attention to detail, encouraging us to put more thought into who we connect with, how we connect with them and how those relationships should be managed within the forum*

*Reviewers: Catherine Bourne, solicitor, and Natasha Koshnitsky, solicitor, Archon Solicitors*

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*At a time when it is reported that two-thirds of the legal profession are experiencing stress, we should not ignore wellbeing KPIs as part of the embedded culture of any firm*



## Stress tests

**BARRY DAVIES, PRACTICE DIRECTOR**

At home, I recently discovered my young daughter avidly pretending to read through an old copy of *Law Firm Remuneration, Reward and Motivation* (edited by J Renz). Such a proud moment led me to thinking how things might be for future generations, such as hers, as to the drivers for motivation at work and performance metrics.

I feel the mantra of many managers is 'if you can't measure it, then you can't manage it', to which I've only ever partly agreed. If you measure something, is it good, bad or indifferent?

For key performance indicators (KPIs) to be worthwhile, much more than simple measurement is required. There is a great reliance on the target-setting process being realistic at the outset, a meaningful interpretation of any metrics, the use of readily available benchmarking reports to identify how your firm sits next to others (preferably with a geographical or practice style comparison), and most importantly your firm's culture. What works well in one firm could be disastrous in another. The KPIs adopted by any firm should measure behaviours and be able to tell a story or act as a health check of how it is operating, with any warning signs.

Traditionally, KPIs in law firms focused purely on the financial issues such as profit ratios, debtor days, average bill value, and the old favourite: chargeable hours. Some magic circle firms have dropped the latter in their performance rewards assessments. We are seeing the emergence of newer models that don't just rely on a team of people being thrown at a client matter to record as much time as possible, but instead take more of a team approach to achieving goals, and most

importantly consider what is in the client's and public interest and also employee motivation.

Some firms are exploring reward mechanisms linked to individuals, based on business development KPIs as well as financial performance such as new client gains per month, or clients referred to other departments with reward for conversion. These are usually met with enthusiasm. It would be interesting to see some compliance KPIs being introduced and used to improve compliance with new SRA regulations coming through.

However, at a time when it is reported that two-thirds of the legal profession are experiencing stress, we should not ignore wellbeing KPIs as part of the embedded culture of any firm. Half of those experiencing stress feel it is part of the job, maybe as a result of the traditional methods of having KPIs imposed on them and the 'available at any time' advances in technology. To balance this, wellbeing KPIs to consider could be workload volumes per individual (this would also deal with compliance KPIs); the use of chargeable hours, but from a wellbeing perspective; days worked without leave; number of medical appointments, or the Bradford factor formula as a positive indicator. As is the case with financial or operational indicators, the list could go on and needs to suit each firm and its culture, but would hopefully lead to better productivity and a more motivated individual or team.

The dashboard for KPIs needs to be balanced and not focused on short-term 'wins', with frequent monitoring – nor is it just an annual business planning tool. KPIs are ultimately only results, and while useful they require a good dollop of common sense and judgement to be applied to them. **LPM**

### LPM FIRM FACTS

**Douglas-Jones Mercer**

**Revenue: £4.5m**

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Q&amp;A

## Making IT happen

Victor van der Poel, director at Accesspoint Technologies, on some easy wins for SME law firms when it comes to leveraging their technology

### Q What is the art of making IT happen?

**A** In short, understanding the all-important market drivers and creating different solutions much faster and better than your competitors.

### Q Where should our thoughts and investment plans for IT be focused?

**A** How many times do we receive an email, only to answer the phone five minutes later because the caller has not had a response yet? Everything is more instant, and clients want their answers now. So, given the fact that most industry observers believe that success will, to a large extent, be based upon innovation around service delivery, it seems to me the next steps that should be taken from an IT development perspective are those that will bring about a much faster, closer and better structured 'sticky' collaboration between lawyer and client. Social media has changed how we interact and communicate, contributing to the pressure on business to be more personal and

responsive. Creating direct and highly secure personalised communication channels is becoming a key focus for modern law firms. Such channels not only answer the speed issue and make things sticky, but dramatically improve the client experience with improved information sharing possibilities and immediate communication between client and lawyer.

### Q How can I get quick wins from IT?

**A** We don't want to have to continually reproduce or re-enter data which our client has already provided, or that they could provide electronically. We want to better structure and control the manner in which they provide it to us. We need to be more mindful of clients of the future – the generation that doesn't know what it means to live in a world where the internet or smartphones don't exist. We need to look at how they see the world and interact with one another. Many of them already balk at the notion of sending an email – it's too slow. They prefer instant messaging. Today we are able to, and must go, further. At a basic level, we need to increase our use of electronic forms. No, not more forms for more work, but more structured forms, for more immediate responses, and providing more meaningful



*We need to be more mindful of clients of the future – the generation that doesn't know what it means to live in a world where the internet or smartphones don't exist*

interaction with the client. For example, the increased use of diagnostic forms to collect information from a potential or prospective client can greatly speed up the interaction between the client and their solicitor. This approach will also ensure that the client arrives understanding more about the complexities of the case, and therefore what value their solicitor brings. If we have the client respond to pre-prescribed questions we can collect and store all responses instantly and electronically in our systems for consideration or reference at any point in time. Of course, on arriving in our system the capture process from our electronic forms can go on to spawn a series of automated events via our practice management systems. Bringing all of this together is the art of making IT happen. **LPM**

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*APIs differ widely in their scope, quality and ease of use. It's rarely immediately obvious which data elements can and can't be integrated, and it is often a very skilled technical task to deploy a connection between them*



# What's the bacon?

SARAH TRUDE, THE DATA OPTIMISER

When it comes to a good old-fashioned full English, views are very mixed. Do you consider the mingling of the perfectly cooked sizzling components a necessity, a bonus or a downright taste bud travesty?

So, let's develop that a little and think of the egg as your practice management platform (it's where your business grew from in those early days), and the beans your client relationship management system (full of hundreds and hundreds of little capsules of high-value information to help fuel your growth). Do you want those to mix or, to couch it in more technical parlance, integrate automatically, seamlessly and robustly?

I think I can safely say that we should all start with the idea that the business case around integration and automation is already established – it's understood and desirable. When deployed correctly, APIs can facilitate the efficient synchronisation of master records and transactional data that form the lifeblood of your business. Because data is your most valuable asset, how it is handled, maintained and leveraged is the cornerstone of growth and profitability.

But it's not all good news. There is a technical challenge. APIs differ widely in their scope, quality and ease of use. It's rarely immediately obvious which data elements can and can't be integrated, and it is often a very skilled technical task to deploy a connection between them. Some APIs contain technical functions which demand a deep level of coding expertise to manage the connections, and very few firms have these resources readily available in their business.

The Forbes Insights report, published in June 2018, highlights that 87% – yes, let's just let that number sink in – of respondents, from a cross-section of professional services verticals, are

not confident that they are leveraging all available customer data. That's even more alarming when you consider that the respondents were all firms with turnover in excess of £80m, and the job function breakdown was 44% CIOs, 44% heads of marketing and 12% heads of customer experience. If those guys don't have it, what chance do you stand?

Getting control of data to make informed strategic business decisions is crucial to competing. Firms need an operational data layer that is core to business processes, and which supports data leverage.

If you already have this layer, then hats off; you are well on your way to being a true disruptor – assuming you know what to do with it now you have your hands on it?

And if you don't, it's time to get to grips with it. From a technical perspective, I believe you will be best served by a browser-based UX, cloud-deployed platform, using a serverless architecture. This means your connectivity platform will always be available, low-friction, scalable and very high-speed – we all hate waiting for data, and being 'out of range' is simply not acceptable in today's competitive landscape.

So, working with the right technology partner will enable you to successfully mix those eggs, beans and beyond! The bacon, mushrooms, toast and all your other favourite morsels (I left out black pudding so as not to divide the crowd too much) translate as the other strategic platforms you deploy throughout your business. Done well, it all combines to make one heck of a good case for ordering, and devouring, the whole delicious plateful. Your preference for brown or red sauce is up to you!

Sorry for making you hungry, but always happy to buy you breakfast if you'd like to talk. **LPM**

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*Adopting a hybrid approach helps you to plan your cloud journey in a phased, controlled manner. It will help you to realise the benefits of SaaS services, extend your applications and data to the cloud, and control resources securely*

# Hybrid times

ANDY BEVAN, THE CLOUD EXPERT

It's safe to say the legal sector is no longer shying away from the use of cloud services. While adoption rates might be higher in other industries, law firms are reaping the benefits of this technology in some form, whether that's Software as a Service (SaaS), Microsoft Office 365, or a disaster-recovery solution.

Despite the widespread use of these cloud services, most firms remain hesitant when it comes to public cloud. The reasons for this could be concern over regulatory and compliance issues, lack of practical experience, or merely perception of the 'public' moniker and all that entails. This is especially true for smaller businesses that don't have the benefit of a large IT team to help them to understand the technology, migrate workloads and ensure integration with other systems.

But cloud doesn't have to mean cloud-only.

Clearly, unless you're a startup – born in the cloud, if you will – going headlong into cloud with all you've got isn't really an option. Instead, it requires a more staged approach, taking into account your specific use cases, existing technology and future plans. This is where hybrid cloud can add real value. Jargon aside, what is hybrid cloud?

Gartner defines hybrid cloud as 'policy-based and service provisioning, use and management across a mixture of internal and external cloud services.'

Translating this, a hybrid cloud approach is about using a mix of IT solutions, be it public or private cloud, datacentre hosting or on-premises

services to achieve the desired goal. This is especially relevant because as the technology matures and users, specifically law firms, become more comfortable with this operating model, you can focus more on the outcome – increased productivity, agility, flexibility, improved security, resilience – and the use of the right technology or mix of solutions to make that happen.

With the move to more flexible and mobile working, you can also enable your staff to work from anywhere and access case files, data and billing systems wherever they are, be it a client site, or travelling or working from home. This allows for better collaboration between staff, regardless of where they are based, and you can be assured that your firm's data is always available and safe.

More importantly, adopting a hybrid approach helps you to plan your cloud journey in a phased, controlled manner. It will help you to realise the benefits of SaaS services, extend your applications and data to the cloud, and control resources securely, wherever they are.

It's true that moving your hosting off-premises is a big step. It's an even bigger step to public cloud. If you're not ready, or you have to maximise your current infrastructure investment, that's understandable. A hybrid approach gives you the best of all worlds, allowing you to realise your existing technology investments at the same time as taking measured steps toward cloud consumption, while still meeting regulatory and organisational requirements, and most importantly keeping users happy. **LPM**

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*Clients now want their updates quickly rather than waiting to receive a letter. The use of email, or services that automate communications such as The Link App or Perfect Portal, allows you to overcome this challenge*



# Paper cranes

ALEX WILLIAMS, THE TECHNOLOGIST

Digitalisation continues to become more significant for law firms wishing to meet the wants and needs of their clients.

Customers not only expect speed, ease and modern processes, but are increasingly aware of the impact they are having on the environment, and what a business is doing to address the growing issues.

One big way to future-proof your business is to start the journey to becoming paper-light. Ditching the paper file doesn't just enable a more agile way of working, it also reduces costs and allows staff to be more productive by eliminating the need to print every document. Firms can also increase their workflow and automation through switching to digital methods, in turn reducing the number of delays and allowing for a better client experience.

Going paper-light is an opportunity for a firm to question its current procedures and processes. Are you doing a task because there is a legitimate business need for it or because it is the way it has always been done? Posting slips is a good example of something that is often very paper-heavy, but which can be dispensed with

by using technology. A firm can use its practice and case management system to generate the request and send it for approval before it is processed by the accounts team, as most systems ensure an electronic audit trail has been recorded against the transaction.

The amount of post sent to clients is another example of wasted paper. Clients now want their updates quickly rather than waiting to receive a letter. The use of email, or services that automate communications such as The Link App or Perfect Portal, allows you to overcome this challenge. Previously, the need to capture a signature had been a significant barrier, but it is now possible to use software such as Adobe Sign to overcome this. Technology is moving quickly and it's up to you to make sure you keep up with it.

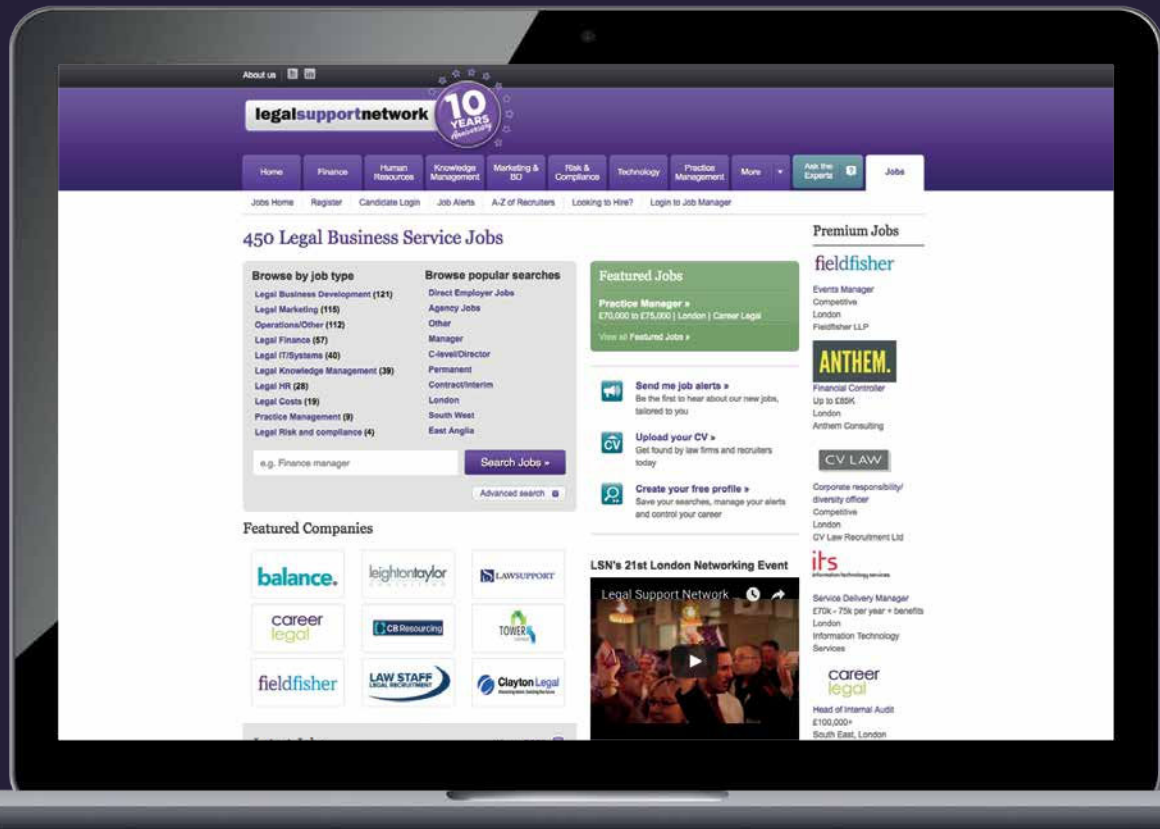
Tikit is dedicated to ensuring that all of our clients are able to go paper-light at a pace that suits them. We demonstrated only last month, at our sell-out P4W regional user groups, how firms can use our software to make gradual changes to the way they work and decrease the amount of paper they use. Small changes will add up to significant results. **LPM**

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*A good MSP will make available skilled technicians that the average law firm cannot justify employing, ready to assist with all stages of your infrastructure development and maintenance*



# Parting the clouds

NICK HAYNE, THE DATA MASTER

In February 2019, The Law Society published its Lawtech adoption research report, which showed a rise in the number of lawtech businesses supporting the work of law firms in the UK.

There is growing acceptance of how lawtech, like automation and AI, can help lawyers to access, interrogate, and use large amounts of data, with greater efficiency offering the opportunity for increased profitability.

The ability to exploit this innovation relies not only on law firms having robust, reliable and secure IT systems, but on the ease with which IT is available, accessible and kept current, and the expertise to integrate new technologies.

Given the need for mid-tier and smaller firms to compete on an equal footing with bigger names, outsourcing IT management is one route to success – but there are pitfalls. Consider the following when looking at different managed service providers (MSPs).

Does the MSP understand your sector and the unique challenges you face? Does it have relatable experience deploying solutions and services in a law firm? Has it worked with law firms of all sizes, from small, single-office firms to large, well-established firms with multiple offices, including international locations?

Also consider whether you are dealing with a viable business. Look carefully at its financial and company position, not just the figures on the balance sheet or credit rating, but also whether the business and pricing model feels like it will survive the contract term.

Which of your shortlist has the strongest vendor relationships, not just with top-tier tech partners like Microsoft, but specialist providers to the legal sector? Strong relationships allow an MSP to leverage the benefits of best-in-class third-party providers on your behalf.

Understand who will actually work with you. Is the business led by an experienced, reputable management team? What relevant technical certifications are held? A good MSP will make available skilled technicians that the average law firm cannot justify employing, ready to assist with all stages of your infrastructure development and maintenance.

Consider sector knowledge. Does the MSP offer all the solutions and services you need to help your firm operate effectively, efficiently and securely? Does it offer cloud solutions, backup and recovery services, business continuity planning, disaster recovery, unified telecom services, application hosting, third-party vendor management, consultancy and project management?

Will the MSP offer a tailored service? Cloud is the prominent trend in investment technology, but is it right for your business? Will your MSP understand your challenge and offer the right solution based on your specific needs, rather than what they prefer to sell? Does the MSP have skilled technicians able to cope quickly with on-premise solutions, regardless of geography?

Reflective of most law firms, it's better to deal with an MSP still owned by individuals who care about the long-term future of the business. Investment in quality systems and people will deliver benefits to all clients, rather than achieving an appropriate earnings before interest, tax, depreciation and amortisation (EBITDA) to trigger a profitable sale for owners who have little contact with the clients.

This is not an exhaustive list, but it raises some points to consider based on our years of experience in the sector and the topics raised most frequently in the 'any questions' portion of our pitches. **LPM**

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# New metric systems

Data is essential to measuring staff performance and productivity, but are firms moving beyond the billable hour metric? Jem Sandhu asks law firms how they capture performance data, the challenges they face, and whether they see new KPIs on the horizon

There was a time when fee earner productivity was incredibly simple to track, with the billable hour being the undisputable core of measurement. That this metric, along with key performance indicators (KPIs) such as utilisation and recovery rates, are now called 'traditional' is an indicator of just how much things are changing when it comes to tracking performance.

Firms are increasingly looking to a wider range of productivity KPIs – beyond fees billed, time charged, and collection rates. This is owing to an increasing focus on outcomes, more holistic approaches to performance, and new tech that can capture each second of work, providing unprecedented detail about how fee earners spend time on transactions.

And with firms under increasing pressure to price matters more accurately, it is even more important to figure out exactly how much a matter costs.

## OLD-FASHIONED NEWS

Traditional KPIs still lead the way. Eastbourne-based law firm Stephen Rimmer uses a case management system (CMS) together with its dashboard Overvu to capture performance data – measuring it against KPIs such as time recording, lockup conversion time, and billing. The indicators might be traditional, but they're nicely leveraged, says Grant Sanders, practice manager at Stephen Rimmer.

"It provides current progress with the ability to look back historically, giving you data on what happened today compared to this time last year. This gives us insight into current performance against historical trends."

It also means that lawyers can be proactive rather than reactive when issues do arise – a benefit which Sanders sees as a huge advantage. Overvu requires some manual entry, but mostly pulls in data while lawyers are engaged in certain tasks.

"As fee earners complete letters or phone calls, they'll have a timer on and the system posts that time against the file. Then when bills are raised, it automatically updates the file history."

Bedford-based Pure Business Law, which specialises in corporate and commercial matters, also sticks to traditional metrics – using the CMS Clio to record and track hours for both fixed and non-fixed fee work, record the money coming into the firm, and track individual performance against targets.

"We say that this is how much we need to make per month, and we use the system to monitor that number," says Eve Jarrett, the firm's founder and legal director. A 'balance scorecard' – introduced by the firm's data analyst to measure performance more regularly – allows users to input a weekly action plan into Excel.

The firm found the scorecard proved to be a game-changer. "Based on it, we can look at either our internal processes or our strategy," says Nazish Farooq, the firm's legal assistant and business support officer.

## INDICATING DIFFERENCES

Despite the continuing reliance on using hours worked as the basis for KPIs, firms are starting to move beyond this metric. We spoke with one Hereford-based firm that has seen new KPIs emerge over the past few years that also extend the solicitor's role. "Tasks such as precedent development and business development have been factored into targets," says the director,



*As fee earners complete letters or phone calls, they'll have a timer on and the system posts that time against the file. Then when bills are raised, it automatically updates the file history*

Grant Sanders, practice manager, Stephen Rimmer







*It's more a performance development process. If you focus on progressing through the stages of a case, develop people correctly, and provide the client service, you ultimately get the commercial return*

Alastair Fernie, owner and executive chairman, CFG Law

who preferred to remain anonymous.

The development of new KPIs can depend heavily on a firm's practice area. Take CFG Law. Its specialisation in serious injury cases drives the firm's ethos, it says: purpose-driven rather than profit-driven. "The entire firm, together, helps those affected by injury," says Richard Clark, the CEO.

Financial performance metrics don't drive its behaviour. "If we focus on monetary return, we will actually not deliver for clients," he says.

This meant a shift from the traditional HR model of performance management metrics – but it's a move not necessarily opposed to commercial interests. Alastair Fernie, CFG Law's owner and executive chairman, says: "It's more a performance development process. If you focus on progressing through the stages of a case, develop people correctly, and provide the client service, you ultimately get the commercial return."

Serious injury cases are notorious for taking years to resolve, a fact that underlies CFG's competitive edge within the industry. Fee-earner KPIs are geared to each specific client and include measurement around the number of cases a colleague is responsible for, the duration of a case, and time to settlement.

"The metrics that we use incorporate how fee earners are progressing and achieving the key stages of a case," says Clark. The firm's matter management and practice management system is provided and integrated by Linetime, used in conjunction with Excel. "For some of the tracking relating to the milestones or stages, we have to do a data export between Linetime and Excel, then back into Linetime."

Clark points out that a firm's values are the main factor in taking a different approach to

performance development. "That's misunderstood in this industry. But lawyers are still trying to record time, to bill more clients, and to win more clients."

At CFG, however, targets are not about the number of hours recorded. "We'd rather spend 300 hours on a case over two years and achieve an early, great outcome for the client rather than spend 500 hours over five years to achieve a greater profit for the firm," explains Clark. A quicker outcome also means more time to focus on the next client, he adds.

## VIEW ACROSS THE KPIS

Firms can look at traditional KPIs as just one measure of performance and productivity. For Hedges Law, chargeable hours are the core KPI around which it benchmarks performance. However, according to practice manager Karen Edwards, the firm does take a broader view.

Most of the financials – such as target hours, utilisation rates, and chargeable hours billing – are captured via the practice management system. This is coupled with an HR system and Edwards notes that it's easier to capture certain performance data for some work (for example, fixed fee matters such as conveyancing) than for others ("litigation can be a bit unending").

Support staff contribute to financials in an indirect way and might have KPIs for client conversion of walk-ins, for business development contribution, or for top-rate testimonials for example. All staff meet monthly with line managers for performance conversations, or "make the difference reviews" as they are known, to look at a whole range of KPIs.

But these are not just, as Edwards puts it, "death by numbers". The business' strategy "is as much about everything else that goes on behind the scenes as it is about the numbers. The essence of our culture is 'making the difference' and it's the 'everything else' that is measured, discussed, reviewed and logged on the HR system."

And client satisfaction metrics are not just about the resolution of a case. The team at Hedges also send online surveys to clients at key points in the matter. These 'client satisfaction scores' are then presented to all staff in a graph format at bi-monthly staff meetings.

"If scores are not good, we take our real learning from that," explains Edwards. The firm also looks at data from reactions to team

### LPM FIRM FACTS

**Hedges Law**

**Revenue: £2.8m**

**Corporate status: Ltd**

**23 fee earners, 40 total staff**

**Offices: Oxford, Wallingford**

### LPM FIRM FACTS

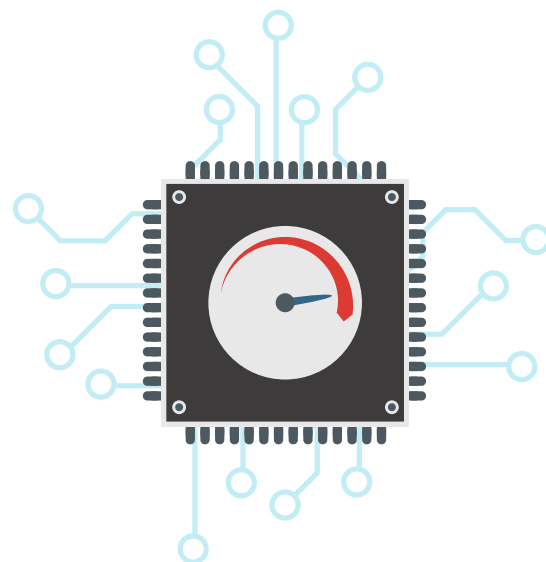
**Pure Business Law**

**Revenue: undisclosed**

**Corporate status: Ltd**

**6 fee earners, 8 total staff**

**Offices: Bedford, London**



*If our staff are not meeting KPIs, it's a good indication of where we need to invest, support, coach, or train*

Karen Edwards, practice manager, Hedges Law

members' blog posts. "As soon as there's a development in the legal world, one of our experts will comment on it, and their blog then hits our news section, the appropriate social media channels and appears simultaneously on the person's website profile page." The firms does this with knowledge-sharing software service, Passle, which provides a detailed "number of likes and shares" report for each blog post.

Hedges Law has no direct social media KPI, but Edwards is interested in the possibilities. "Social media is the modern way to showcase the firm to a wider audience quickly," she says. "There's always a discussion at the monthly reviews about what business development activity you have done. It's cost effective and it's a resource still hugely untapped by most law firms."

Capturing performance data for business services and support staff can be tricky. There's no discrete unit of measurement equivalent to the billable hour. The director of the Hereford-based firm we spoke to says that they even try to avoid such measurement altogether because accuracy is such an issue. He gives the example of a tool used to measure typing. "For matrimonial matters, the person might be typing out court statements, so their foot is on the pedal for a long time compared to someone amending a hard copy of a commercial document. The person working on the hard copy does as much work, but it wouldn't be measured because the system only picks up typing."

Sanders at Stephen Rimmer points to another issue: "Even if a department's paralegal is not recording time, you can still see their outputs. But it can be difficult if you have someone whose role bridges a gap, or if you've broken up the process. It might actually be an hour's work, but you might not be recording for that properly."

## A NUMBERS GAME

All the firms LPM spoke to reviewed performance data regularly, and all agreed that these numbers were just part of the performance equation.

Hedges Law reviews the numbers monthly, but doesn't automatically assume that employees are at fault if results are poor. "If our staff are not meeting KPIs, it's a good indication of where we need to invest, support, coach, or train," says Edwards.

Initial investigations include asking the fee earner whether they're overworked, looking into

whether their cost estimates are too low and whether they are using the systems efficiently, or checking that secretaries are supporting fee earners in the right way. "It's not just about partner profit. We want everybody to feel they're contributing to a bigger picture – and not just that they are here to produce billing. Sharing a whole range of metrics openly with staff shows that we do care about more than just the money. Getting the 'everything else' right tends to mean that the bottom line looks after itself," she says.

CFG takes much the same attitude towards its case milestone metrics – important though they are. "The performance review is about assessing career development as well. You ultimately get the commercial benefit," says Fernie. And as an indication of how seriously the firm takes people development, it sends senior staff to Harvard Law School's accelerated leadership programme.

Over at Pure Business Law, Jarrett reviews CMS data every two weeks, and gets management reports straight from the system.

"If people don't meet targets, we speak to them first to uncover the reasons. However, the numbers are still important. They help the business to measure performance and maintain good cashflow. If someone does not record their time, we can't bill the client for it and that affects our profits," she says.

## ACCURACY MATTERS

Jarrett has spent the past year working on a complex case, using both electronic and manual methods for time recording. Much of the work in the case has to take place between other pressing tasks.

"I'll be on a phone call relating to the case, taking notes. I put the phone down, and immediately get another call. So, I note the details of the new phone call manually on an

### LPM FIRM FACTS

**Stephen Rimmer**

**Revenue: £5.2m**

**Corporate status: LLP**

**92 fee earners, 41 total staff**

**Offices: Eastbourne, Hastings**

### LPM FIRM FACTS

**CFG Law**

**Revenue: £4.5m**

**Corporate status: Ltd**

**46 fee earners, 75 total staff**

**Offices: Stockport, Cheadle**



*Sometimes people input the information once a week or monthly, which causes errors. We do talk about the inaccuracy of time recordings at weekly staff meetings, as an action point, and also deal with it at supervision sessions*

Eve Jarrett, founder and legal director, Pure Business Law

attendance note, intending to go back and put it on the CMS, but so much happens in one day that on occasion I'm unable to do it so I give my note to an administrator to input.

"It's not always possible to record time immediately. We ensure that all staff keep manual notes of time-recordable matters, and these are later inputted," she says.

Her experience is not uncommon, pointing to a compelling argument for not relying solely on performance data gathered by systems – that the numbers, particularly if there's a time lag when inputted, still might not be accurate.

"Sometimes people input the information once a week or monthly, which causes errors. We do talk about the inaccuracy of time recordings at weekly staff meetings as an action point, and also at supervision sessions," she says.

Buy-in might be an issue when it comes to inadequate recording. Edwards at Hedges Law says a lot of it can come down to attitude. "Sometimes it's a system thing; how can we make it easier for people to capture data? But it's also the mindset. You can train people in the process, but they're not machines. If you really want to engage them and ensure they are recording, then helping them see the benefit of doing so, and speaking to them regularly about their numbers, is key to success."

Sanders at Stephen Rimmer agrees with the idea that the problem might be largely cultural. "Trying to get people on board with why you're recording time comes through building the right culture, and communicating and demonstrating its value. We try to show the value of recording time properly, even with fixed fee work, so as a business we can look at whether the fee remains fair," he says.

Clark at CFG outlines another factor when introducing a way of working that requires regular recording. "The challenge is trying to get people to move away from the way they used to work. It's a classic change problem. So, you might have gaps – for example, information from the system that tells you that a particular precedent has not been used, or that fee earners haven't provided any information related to key milestones, or have gone past that milestone without signing off to say it's completed."

Whatever the reason, inadequate data input can make it look as if fee earners are simply not working hard enough. As Sanders points out: "Traditionally, fee earners know how to time record and what their unit is worth. Someone spends half an hour on a call and records 15 minutes because that's all they think they can charge for it. I would rather see them record the full half hour and then have a conversation about whether it should all be charged."

It can also be time-intensive to take a new approach to performance measurement, at least at the outset. You have to change the views of people who've come from traditional industry. "It takes constant messaging to convey that you're not going to be targeted on time recorded or the hours at your desk," says Fernie.

The message is reinforced in reviews. "We tell them that they will be rewarded and don't have to worry about partners monitoring their work. We trust our people. If we hire you, we trust you. The bigger firms just monitor with lots of KPIs. It's easy to do numbers but it's not the same thing as managing or leading," says Clark.

Meanwhile, trends outside of performance metrics themselves might impact the development of new KPIs for people. For example, Sanders sees a move towards a client preference for value-based pricing.

"It's a focus on outcomes and results rather than inputs and time recording. More clients are wanting to fix agreements for reassurance on their costs."

An outcomes-based approach for Stephen Rimmer is three to five years away, he says. "New entrants are better placed for it. Traditional law firms are set up with systems geared to traditional approaches," he says.

Edwards' interest in using social media more widely is perhaps just the start of law firms looking to introduce new type of marketing KPIs. This might be welcome news for fee-earners who would like to be measured on contributions that fall outside of the billable hour. **LPM**



## REGIONAL FOCUS

# Eastern angle



Did you know that the world's most complete mammoth skeleton was found in West Runton, Norfolk in 1990? The region may have a long history, but the law firms in the area are with the times. Kayli Olson reports

Regions in England are hard to truly define with any general consensus – due to historical importance, economies and so on. The east of England as defined as counties between the Wash down to Essex (controversial) provides an interesting view of the legal sector indeed. The biggest players in the area are the likes of Birketts and Mills & Reeve, but the large majority of law firms are SMEs.

Robert Ferguson, chief strategy officer at Ashtons Legal, says unlike the other regions, the east of England has no single town or city that's recognised as the economic powerhouse, such as Manchester in the north-west or Birmingham in the midlands.

"This presents challenges in terms of business structure. Do you go for offices everywhere or centralise? This in turn leads to how you balance regional business units with local office presence."

Ian Carr, CEO at Prettys, adds: "Big firms like Birketts are significantly larger and are not really blocking the competition." Plus, the bigger the firm the more interest in other regions, which comes with a different strategy and approach to markets.

Ferguson says that for his firm, the focus is very much on the region as a whole – being up to date in terms of online presence and technology while at the same time not forgetting that some of the more traditional businesses and individuals in East Anglia still work on the basis of who you know or who recommends you.

All interviewees agree that there is room for collaboration between law firms. "You can't do it all," says Guy Longhurst, managing partner at Ellisons.

"Some of us may agree to be in competition, but equally we're working alongside one another,

which fosters good working relationships and ultimately great work. At Ellisons, we're not looking to poach clients, and often refer work to others in the case that, for whatever reason, we can't act for a certain client."

## THE FIRMS

Ashtons lands toward the larger end of the SME legal market in the area, and is the result of a series of mergers over a number of years – most recently in 2011 when Ashton Graham merged with Kester Cunningham John. It created a firm with a strong regional footprint in the east of England, Ferguson explains.

The firm is now represented in Cambridge, Norwich, Ipswich and Bury St Edmunds. It has four groups, of similar size – individual client, business law, property, and injury services, each operating at local, national and even international levels (with a French legal services team that advises on French property sales and purchases and French Wills and other estate matters).

As well as being complementary geographically, the 2011 merged firms brought together personal injury and clinical negligence practices – one predecessor of which had a very well established



*The east of England has no single town or city that's recognised as the economic powerhouse ... This presents challenges in terms of business structure. Do you go for offices everywhere or centralise?*

Robert Ferguson, chief strategy officer, Ashtons Legal

Court of Protection team. Adrian Mundell, non-solicitor partner on the team, acts for clients in the US who might need a professional deputy to administer affairs here, as well as holding many UK-based professional deputyships. This niche expansion ethos spread, and, shortly after the merger, Ashtons acquired a specialist franchise practice and then more recently, a small franchise consulting business.

Ferguson says the firm has also moved within the sector to go beyond purely legal and into offering consultancy services to potential franchisors. He says it's a question of identifying where the opportunities are for the firm.

One of the oldest players in the region, Ellisons has been around for more than 250 years. Originally situated in Colchester, the firm opened an office in Ipswich five years ago and in Chelmsford last year. "We're expanding our presence down the A12," Longhurst says.

He says: "For a firm in East Anglia, if you've got a very strong client-facing offering that has a breadth of services as well as expertise, that's where the opportunities lie."

Prettys has a single office in Ipswich – it too used to have a presence in Chelmsford, for nearly 10 years, but as the lease expired on that and there was more of an MO of clients rarely coming to that office it was time to let it go, says CEO Ian Carr.

But Ipswich isn't the only base of operation for the firm. Prettys enables staff to work flexibly and provides the necessary equipment for home working. And if needed, usually for older clients, Carr mentions, Prettys can set up meeting rooms in Essex and elsewhere, or visit clients at home.

Prettys is part of an international referral organisation called Galexy. "We're actually holding the international conference here in Ipswich in July.

"We believe we've got a niche in the market

and that's due to the people we recruit and retain based on our style, and a focus on client service. The values that you see on our website we try to live day to day, and we consider that to be a differentiator for us – providing expertise, great results, and peace of mind," Carr says.

## THE CLIENT IS RIGHT

Carr is not a lawyer by background, but an accountant – brought in as CEO to give the firm a more robust focus. He says: "When clients come to see us, it's often for quite a stressful reason. And therefore, if we can have a strategy with options and agree how to move things forward on specified timescales, we can help to give them that peace of mind."

Prettys is very much focused on responsiveness, he says – with a new telephony system the firm can monitor response rate for calls as well as via email, and it continuously sees client feedback.

Some clients do pop into the office, he says – Prettys will hold mediations, for example – but in general, certainly on the commercial side, staff go out to see clients.

And Suffolk clients are slightly different to those in Essex, he adds. "As a generalisation, Suffolk clients tend to be very loyal and demand high levels of service. They tend to buy all the services from one firm. Essex, being closer to London, are more likely have a bank of lawyers who act for them and they'll dip in and out as needed.

"One of our objectives is to have clients, wherever located, experience one part of our service and then translate that across the whole firm."

Also an accountant by trade, Ferguson at Ashtons says its client base also very much reflects the East Anglian economy – it's varied and ranges across business and individuals.

"There are some key cities in the region, but the vast majority of the area is rural and coastal areas where there is relatively limited economic activity. Our sectors reflect what you would expect from that sort of area, including a strong agricultural team. We act for clients ranging from small startups to some quite large businesses in financial services, such as the Cambridge Building Society. There is a significant difference in terms of what these clients want and need."

Longhurst at Ellisons adds that the firm's corporate commercial team is bigger than it has ever been before – with Chelmsford being a strong market. He too notices a difference in the



*For a firm in East Anglia, if you've got a very strong client-facing offering that has a breadth of services as well as expertise, that's where the opportunities lie*

Guy Longhurst, managing partner, Ellisons



southern part of East Anglia; as it is close to London work tends to be more business-focused.

Ellisons also has a boutique insurance litigation team, which is unusual for a firm of its size, so that takes the practice out of the local area to London, Gibraltar, and Glasgow. East Anglia has a very strong insurance connection historically – Longhurst adds that because it's robust it's helped the firm grow irrespective of the ups and downs in the wider economy.

He says there's a desire to get out of the office and see clients at their workplace or meet at intermediary offices. "At Ellisons we offer the relationship that clients have typically had with their accountants. We want them to pick up the phone and feel like they can talk to us about anything. You can only achieve that by lifting the bonnet on what they do day to day."

There's a heavy focus on spending time with clients as well as supporting community events in the local area – a lot of that activity runs alongside business development plans. But really, for a firm that's been around as long as Ellisons has, Longhurst says, you want to make a difference in the community.

## AT THE HEART

The same is true for staff. Longhurst says the firm invests heavily in training existing staff. "We have more trainees listed than ever before; we're currently training around 15 colleagues to be legal executives. We pay for their studies and give them half-day release for revision and exams.

"Our staff retention rates have always been really good, and we want to make sure that continues. One of the worries as the firm grows is that there's a risk your culture is seen to change."

As is the nature of the legal sector, he says, some of that growth has come due to competing firms having their own challenges.

Ellisons has always been very laissez-faire about working policies. For example, people can just get on with work and leave early for childcare or an appointment as necessary, he says.

But Longhurst does see a drive in the market towards having a more mature staff benefits policy, which is underway at the firm, as well as a flexible working policy in place. "The biggest thing for a firm is making sure everyone feels valued and is important."

Carr at Prettys echoes the views on the importance of good CSR and giving back to the community – as well as on the point of giving staff the tools needed and opportunity to operate in the way that works best for them and is



*We ask people to work hard and give them a challenging environment and objectives. But we want them to be able to work in a way that best suits them. Because of the way we track KPIs everything is well managed*

Ian Carr, CEO, Prettys

productive for the firm.

"We ask people to work hard and give them a challenging environment and objectives. But we want them to be able to work in a way that best suits them. Because of the way we track KPIs everything is well managed.

"Alongside all of this is our stress at work programme. If we can identify self-destructive attitudes early then we can help people to deal with it. What's worked best for our recruitment is finding those in London who have experience but want better work-life balance. At the end of the day it's the quality of our individuals that deliver good client service," Carr says.

He says the area is a really good place to work, the main challenge is getting good people out to join them.

Work-life balance (or rather work-life blend as Ferguson says) is key to attracting talent to the region. Ashtons offers unlimited paid holiday – as long as staff take the minimum statutory requirement and it works for their team.

But the firm now has plans to move toward a "true agile working model," he says. Not flexible working, which, he points out, is just enabling people to work from home or out of the office but still very much on a nine-to-five basis.

"True agile working is where you are only interested in outputs. You don't care about the number of hours put in or where they're done. We're looking to push that out across the firm. And frankly, clients are more interested in what you're producing for them than in how it's done."

The SME legal market is vast indeed – but those living and working in East Anglia aren't all that different from other regions. People want good quality life, time to spend with family or out doing hobbies. Clients want good quality service, delivered with handy technology and a human touch. **LPM**

### LPM FIRM FACTS

**Ashtons Legal**

**Revenue: £20m**

**Corporate status: Partnership**

**200 fee earners, 377 total staff**

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

### LPM FIRM FACTS

**Ellisons Solicitors**

**Revenue: £13m**

**Corporate status: Partnership**

**95 fee earners, 198 total staff**

**Offices: Colchester, Chelmsford, Ipswich, Tendring**

### LPM FIRM FACTS

**Prettys**

**Revenue: £6m**

**Corporate status: LLP**

**40 fee earners, 76 total staff**

**Office: Ipswich**

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# CLEAR VIEWS



**Wendy Manfield**, commercial director at **Stephens Scown**, explains how **Katchr** helped the firm be more open about its productivity with staff

**Phil Snee** at **Linetime** offers advice on how tech can make it easier to record time and maximise captured data

# INCLUSIVE DATA

Wendy Manfield, commercial director at Stephens Scown, says Katchr helps the firm to be more open about productivity with staff, which leads to better performance

It doesn't take a rocket scientist to say that a good working environment fosters better performance and productivity from staff. This is certainly true at Devon and Cornwall-based Stephens Scown. The firm has placed in the Sunday Times best businesses to work for list five years in a row.

What started as a traditional partnership out of St Austell in 1938 now operates as an LLP and has a separate ABS running alongside – through which it runs its employee ownership scheme, called Scownership. Launched in May 2016, it was the first ever implementation of a shared ownership model in the legal sector.

Wendy Manfield, commercial director at the firm, says a big player in the success of the model was Katchr's dashboard. "Using Katchr has really helped us to roll out Scownership and drive staff engagement because everyone can see how the firm is doing in terms of productivity and profit."

## LOVE WHERE YOU LIVE

Manfield says Stephens Scown wants to promote a healthy work-life balance and develop a sustainable and profitable business, like any other law firm.

"Our philosophy is 'love where you live' and the West Country is a great place to work. We want staff to be able to go out and hit the surf when the weather is good and the waves are up.

"If we're going to promise that, we have to have a financially robust and sustainable business. And Katchr gives us visibility on the numbers, which means that all our staff can really engage with the business."

Under Scownership, the profit allocation is not based on salary; it's a flat number that's paid to all members of staff, she explains.



*Using Katchr has really helped us to roll out Scownership and drive staff engagement because everyone can see how the firm is doing in terms of productivity and profit*

It's easy for fee earners to be perceived as the be-all and end-all of a law firm, she says, and Stephens Scown wants to break that view. "We really want to make sure that everyone, both inside and outside the firm, understands what we're all about.

"Applying high levels of service is important. We spend time with clients, understand what keeps them up at night and where they want to take their businesses in the next five years. By improving client engagement, we can grow our business and develop relationships that go beyond the purely transactional."

Manfield says Katchr is also a transparent business, that runs along some similar lines. "They take the time to understand us and the legal sector. And they're genuinely one of the nicest suppliers the firm works with."

With Katchr, she says, you really feel like you're being looked after – the team is very much a part of Stephens Scown.

## FREEDOM FEES

The firm's performance and financial information started off as something only individual fee earners and the team leader could see. Then the whole team wanted to see how everyone was doing, which swiftly moved on to secretaries and support staff wanting to see how everyone was doing across the business, says Manfield.

"We decided to open up our financial information and make it available to everyone. After all, if you've got employee ownership, it's about engagement – and being transparent about how colleagues and the business are performing is part of that."

Stephens Scown recently reached its financial year end – Manfield says Katchr was a huge player in that process as well. Historically, business information updated at the close of business the previous night, but with Scownership, Katchr has enabled the firm to run live updates.

The end of the month is when all of the billing is done – and staff put themselves under incredible amounts of stress and bill like mad, she says. "Because of the real-time updates happening throughout the day, Scownership trustees were able to really motivate staff. And we exceeded our fee target this year because of it.

## LPM FIRM FACTS

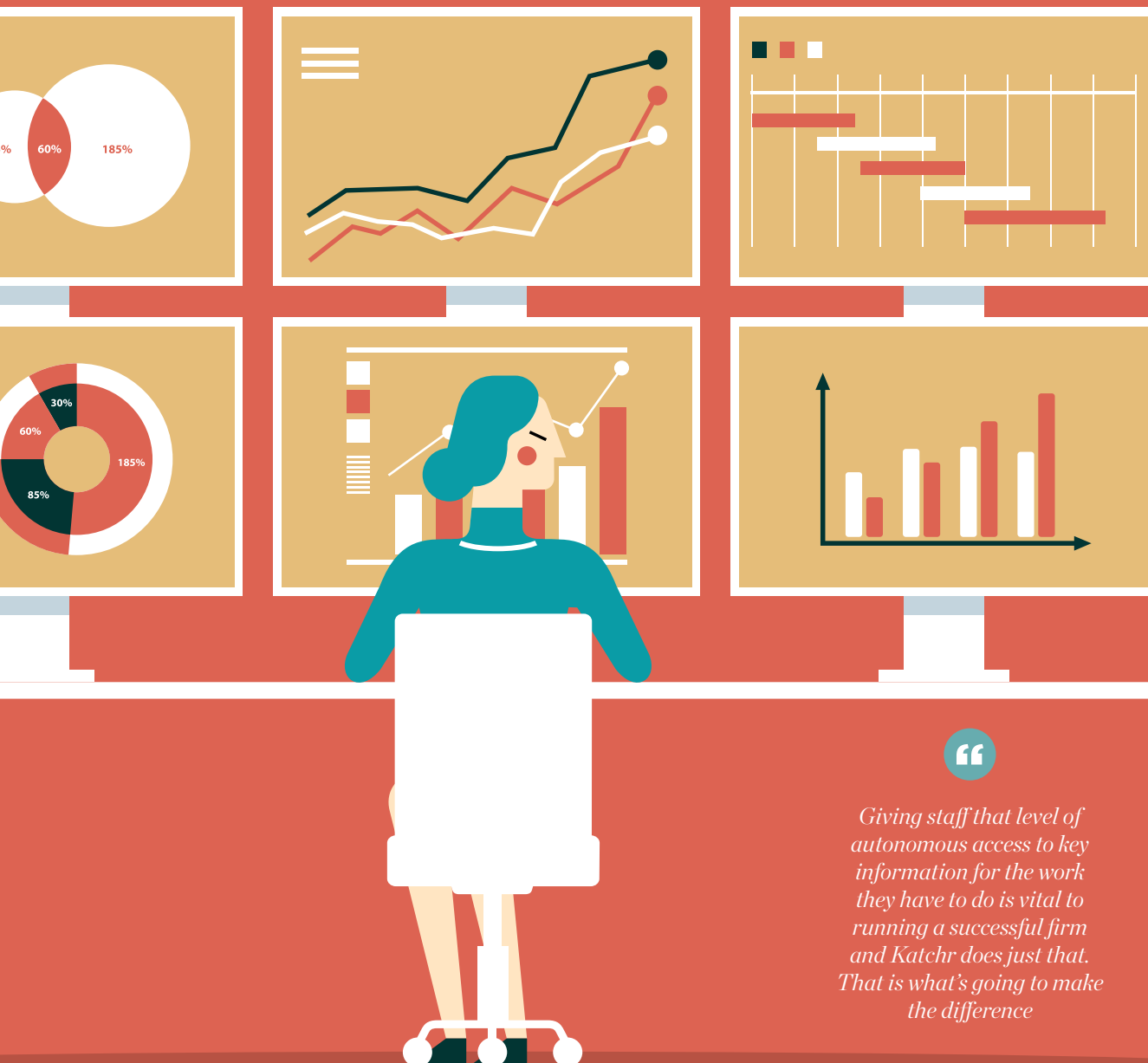
**Stephens Scown**

**Revenue: £20m**

**Corporate status: ABS**

**170 fee earners,  
300 total staff**

**Offices: St Austell, Exeter,  
Truro**



“

*Giving staff that level of autonomous access to key information for the work they have to do is vital to running a successful firm and Katchr does just that. That is what's going to make the difference*

“This year was very special for us because, for the first time, we've hit £20m in revenue. And what really helped was having access to the Katchr dashboard and the numbers in real time. We wouldn't have hit those numbers quite the same if we didn't have those dashboards,” Manfield says.

### MAKING A DIFFERENCE

But Katchr's capabilities and the potential the firm has to leverage performance data doesn't stop there. Manfield says Stephens Scown has just gone through a review with the team at Katchr and given them a list of wishes and must-haves – and when Katchr says they can deliver something, they always follow through, she adds.

Next on the agenda, she says, is to give fee earners and support staff more relevant information in terms of how they manage their matters. “And they'll have access to information straight away instead of waiting to review the

finances in the monthly report.”

It's making the business-as-usual tasks more meaningful – from checking client balances to ensure that they're compliant with the Solicitors Accounts Rules to dipping into matters they need to close off, she says.

“Giving staff that level of autonomous access to key information for the work they have to do is vital to running a successful firm, and Katchr does just that. That is what's going to make the difference. It means people can plan their work around servicing, and absolutely looking after, our clients.”

She says Stephens Scown has another project with Katchr on the go at the moment, one that's going to be a “game changer for the firm and our clients.” The fact that the dashboard is so intuitive and so many opportunities are springing out of it is all credit to Katchr, she adds – and the firm is ready to take performance metrics to the next level. **LPM**

#### ABOUT US

Katchr is the leading specialist provider of management information software to mid-sized UK law firms

[www.katchr.com](http://www.katchr.com)



# CAPTURING LOST TIME

How are law firms at measuring productivity? Phil Snee, development director at Linetime, thinks they could do better. He offers advice for them on how tech can make it easier to record time and maximise captured data

There is no question that law firms are serious about capturing and measuring performance data. The hours worked on a particular matter – hours which form the basis of KPIs such as billing and utilisation rates – are the lifeblood of a successful law practice. The big question is, are firms doing it as well as they could?

Phil Snee doesn't think so. Out of a total of 10, he would give them a score of five, perhaps a six if he's feeling generous. "They prefer the traditional ways," he explains, talking about the requirement to input performance data. Admin tasks can take a back seat to the everyday practice of law. "They're reluctant to do what they see as a non-legal process, although the new generation tends to be more amenable to it," he says.

## ALWAYS BE MONITORING

Based on his observations of the legal industry, Snee says that the traditional practice of recording time, and then charging for that time, actually doesn't happen as much anymore. "People are using fixed fees owing to the pressures of competition," he says.

Somewhat counterintuitively, this makes it even more important for lawyers to record time scrupulously, even if they won't be charging against it: "Recorded time tells you whether your fixed fees are accurate. It also helps you to monitor your efficiency and profitability, and enables you to base your matter budgeting on an analysis of what was done previously." This latter point is why Snee advocates for detailed, transaction-level data migrations: "A system's useless if you've lost your historic data."

But, given all this, people still neglect to time-record. "Traditionally, people panicked when they went back and realised that they hadn't recorded. It's dangerous to lose that time." Human error and oversight are perhaps inevitable – and this is where the right tech can come in. "It all depends

on whether they have systems in place to allow efficient and effective data collection and analysis," says Snee.

He sees tools such as Linetime's Liberate (the case and practice management solution) as part of the answer. It can capture data automatically, not only saving fee-earner time, but catching those small bits of time spent on a matter which would otherwise be lost. "Our team will do calculations for customers based on this to predict ROI during the presale stage," he says.

One method of helping to ensure that measurement then takes place is to work with people's desire for immediate feedback and reinforcement. According to Snee, this could mean setting up processes to monitor activity in real time. For example, Liberate has a real-time barometer-type display of time recorded against budget. "So, as you record time, the display will go orange if you exceed tolerance, and red if you go over budget", he explains.

He offers another simple, but effective, tip – make sure clocks are always visible, no matter the task the lawyer is engaged in. In Liberate, the clocks are ever-present: "Even if they are in Word, the fee earner will still see the clock hovering above the document."

## ALWAYS BE SWITCHED ON

One way to make time recording more painless (and capture lost bits of time in the process) is to use wraparound methods – programme time recording as part of established tasks (or workflows, if relevant), he suggests. "So, as you start a process, whether it's an email, a phone call or word processing, the clocks are switched on. With Liberate, we switch ours on automatically. We recently embedded the clock into Outlook. When people run a particular process – as most case management systems do – they'll clock up a few units of time."

When it comes to more efficient data capture, he also believes that smartphones should play a



*Recorded time tells you whether your fixed fees are accurate. It also helps you to monitor your efficiency and profitability, and enables you to base your matter budgeting on an analysis of what was done previously*





role. "With the advent of Siri and other voice products, your phone should be able to digitally dictate your time-recording narratives."

### MAXIMISE CAPTURED METRICS

Once data is captured, how can management make best use of it? Snee has a number of tips. One practice he is particularly keen on is making comparative performance charts available. Although he acknowledges their potentially divisive nature – "they show someone's failure" – he sees them as effective motivation tools if they're used correctly and displayed to the right audience: "Law firms can make these visible comparisons available across teams, department-wide or firm-wide."

He speaks from first-hand experience – this is exactly what they do at Linetime. "We use these charts to provide a constant, visible indication of the comparative activity of our sales and support staff," he says.

Dashboards also need to be built carefully. Snee thinks that the ability to create viewer-oriented dashboards is a huge development in terms of a

delivery mechanism for KPIs and reporting – as long as they focus on the most relevant information. "Unimportant information will dilute the impact. You don't want clutter." And in his experience, charts demonstrate well and can be useful, but "reports are still ultimately more popular".

He also recommends that dashboards and reports be easy to design and maintain. They need to be constantly reviewed, "otherwise they will stagnate and be frozen in time."

There is the risk that they will initially be useful, he says: "But because they never get changed, they won't progress and improve. You have a flurry of activity when something is installed, and then it falls into disrepair."

He offers one reason dashboards shouldn't be static. "Nowadays, we are able to drill into associated granular data levels to inspect and rectify problems or other actions."

And this last point perfectly illustrates the purpose of all the tools, the recording, the data and the metrics. "KPIs and reporting should assist and promote management activity," he says. **LPM**

### ABOUT US

**Linetime** is a specialist provider of Microsoft-based practice and case management solutions. Clients include mid-tier law firms and in-house legal departments.

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





## Day in the life

### ANTONIA SHIELD MANAGING PARTNER BPE SOLICITORS

She takes us through a day of train journeys, meetings, and problem-solving while on the move



#### 5am

I'm an early riser – I usually wake up between 5 and 6. Today I'm woken up earlier by my son – who has broken his elbow and arm. I usually start the day with Earl Grey tea but am trying to limit my intake. Today is a bad day for consumption! I sort out breakfast for the family, check a few work emails, and then I'm out the door.



#### 7am

I have to go into London for a general client-care meeting – a trip I make around two to six times a month. I drive the short distance to the station and hop on the 7:05 train.

I work on a number of things throughout the hour-and-a-half journey, including revising my teams' job descriptions. Sometimes I bring my laptop, but today I have my tablet – it's so much easier to carry around and I can download work documents. It also has all my emails. The rail-line from the west country to London can have poor connectivity, making it difficult to work within our Citrix environment.



#### 10:30am

At the client meeting, we discuss strategy going forward

after their recent internal reorganisation. We scope that and figure out what we can do for them.

After the meeting, I get a cab back up to Paddington and grab lunch before I get on the train. It's a lot of train time, I know, but it's never a waste. Train journeys give me thinking time; I can do things that I never get around to doing in the office. I'm constantly working on things in the background even if I'm out of the office. For example, throughout the day we are dealing with a time-critical matter involving a client and service of a notice.



#### 2:30pm

I come straight into a meeting at our office in Cheltenham. We're looking to enhance our intranet solution. It's currently a place where we deposit information such as policies and procedures; we want to use it to allow for connectivity across the organisation.

I get out of the meeting at 3:45pm. My diary is clear until 5:00pm – an hour and a quarter of free time! Well, what actually happens is that a small queue of people line up at my desk. One issue precipitates an AML discussion. The social committee also need sign off – are we giving staff Easter eggs this year? (We are!)

At the moment, we're doing our strategy plan for the year. We're looking at, for example, how we better serve clients, and how we respond to new technology. I've got a mind map app – it would be perfect for

articulating some of the strands of our projects. I'm using good old pen and paper, but you do feel there must be a better way.



#### 5pm

I sit down with a senior partner and the CFO to run through a few things before we meet our bank for dinner. It has been arranged following my promotion to managing partner as a congratulatory dinner but also to get to know each other.

Since my promotion, I'm blown away by the number of meetings. I look through my diary and around 60–70% of my time is spent in meetings – it used to be 30–40%. But I have a more varied work life – whether management meetings with teams, conversations around pricing, or internet demos. Calendar organisation is a big challenge. I'm recruiting a PA. This sounds dreadful, but more than anything I need a PA to liaise with my husband. We're like ships in the night. We are two lawyers, so not much time in our lives for down time. Once a week, the boys and I try to go out for dinner or to the pub and catch up. Otherwise it's a juggle of breakfast, bath routines and Athletics! I do try to switch off at the weekends by gardening. It's physically demanding but mentally for me that's my version of the Headspace meditation app. I live in the Slad Valley. It's stunning. We have a wood, a stream, and a lovely garden. I don't think about anything when I'm gardening. I switch off and listen to the birds. **LPM**

**“** *It's a lot of train time, I know, but it's never a waste. Train journeys give me thinking time; I can do things that I never get around to doing in the office* **”**



#### ALL ABOUT

**Antonia Shield**

**Works mainly in Cheltenham**

**Likes skiing**

**Dislikes baked beans**

A black and white photograph of a modern conference room with a large white table and several black chairs. The room is brightly lit by large windows in the background.

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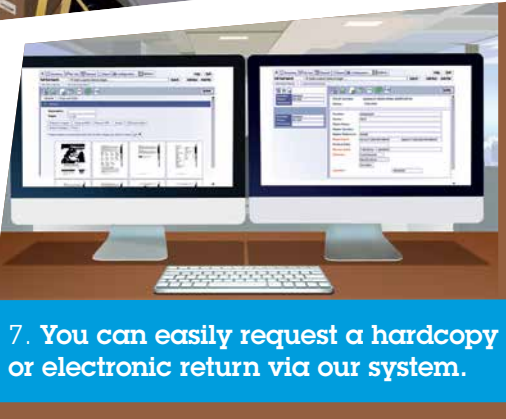


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