

JULY/AUGUST 2019

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A SOURCE OF COMFORT

LPM

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EXPERT
COLUMNISTS
AND ADVICE
FROM PRACTICE
MANAGEMENT

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to love work away from
assigned desks and
out of the office?*



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About us



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



Gem Sandhu is features writer for LPM. She discovers stories and advocates for professional grammar. jems@lpmmag.co.uk



Josh Adcock is LPM's editorial assistant. He jumps to it on everything from interviews to production. josha@lpmmag.co.uk



Allie Bittar is Burlington Media's client services executive. Talk to him about LPM content options! allieb@lpmmag.co.uk



Sarah Cox is Burlington Media's client services director. Want to get involved in LPM? Contact her on: sarahc@lpmmag.co.uk

0800 014 2445

LPM@lpmmag.co.uk

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

For a media company, you'd think we'd be more modern than we are – especially considering how often I shout about the need for firms to modernise their practices. But we're not too different from a 'typical' SME law firm. We fight over the printer, have the occasional problem with the wifi and nag those who leave piles of paper by the side of their desk (I'm looking at you, Josh). That's not to say we aren't with the times in other regards; we have an open-plan office, some technology capability for on-the-go work and have an allotted number of 'focus days' whereby we can get our heads down out of the office. But we are going through a bigger office transformation and it's now time to push our agile working to the stars. It's past time. And the same is true for law firms.

This month we explore what agile working really means and how it looks at SME law firms. Join us on p14 for some insights on how flexible working – including flexible hours, hotdesking, working from home and other such things – works in firms like yours.

Also, take a glimpse at the firms that won the inaugural LPM Practice Excellence Awards and the projects that took top place on pp18-19.

And don't forget that this month is a joint July/August issue, so enjoy your summer and we'll see you in September!

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



IN PRACTICE

05 HR agony aunt Polly Jeanneret addresses veganism, partner problems and the Good Work Plan

COLUMNS

06 Scott Brown at **Accesspoint** on the key brand issues for law firms to consider after a merger

07 Darren Gower at **Eclipse** on the necessary evolution of flexible working for keeping talented staff

09 Nick Hayne at **Quiss** outlines how a managed services provider can help firms to avoid cloud complexity

11 Kate Arnott at **MHA** on 11 issues around firms' future leadership figures and the importance of planning

FEATURES

14 Feature: What are SME law firms doing to offer agile working, what does it even mean, and what's in store for the future of work? Josh Adcock reports

18 LPM events: The winners of the **LPM Practice Excellence Awards 2019** explain the nature of their legal business innovations

INDUSTRY VIEWS

38 Mark Evans at **A&N Care Solicitors** on how the firm partnered with **Accesspoint** to choose the right case management system

40 Paul Lowe at **Wiggin Osborne Fullerlove** explains why his firm chose **Timeslice** as its new practice management system

REAR VIEW

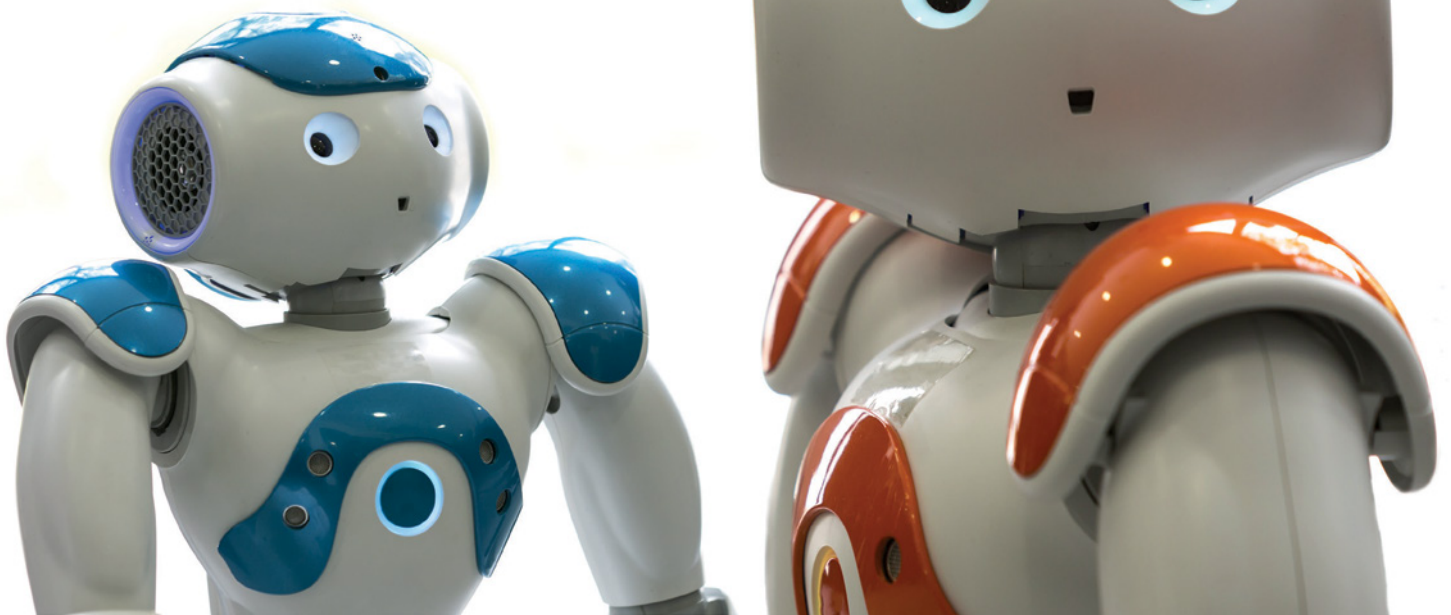
42 Book review: Florence Brocklesby, principal at **Bellevue Law**, reviews Lynne's *Laws of Leadership*

21
SUPPLEMENT
INSIDE:
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Brand together, stand together

The most successful company mergers achieved their goals because they didn't treat branding as an afterthought. We are experts in helping clients develop powerful, unified brands when merging or acquiring.

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article in this
edition for
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LESSONS IN LECTURING

LPM's people guru Polly Jeanneret on preaching about certain eating habits, temperamental partners and back to the Good Work Plan

Q A member of staff has informally complained about a solicitor who is vegan and who has been 'lecturing everyone' about veganism (complainant's words not ours). What would you advise?

A Veganism is potentially protectable under the Equality Act. So it can – though doesn't automatically – have the same protection as other, more familiar, belief systems: so imagine if you replaced the word 'veganism' with 'Christianity'. Although veganism is fashionable, it's not a mere fashion. Also, I'm immediately sceptical about the nature of this so-called 'lecturing'. Often, I find this means that the person who says they are being lectured at simply disagrees with what is being said. In this case, for instance, someone has mentioned there is no vegan option on the staff awayday menu, or suggests that you shouldn't have leather seats. Is expressing a different point of view really 'lecturing'? If, on the other hand, the solicitor has set up a pulpit and is handing out leaflets around the canteen, then it might be time for some polite intervention.

Q We have a profitable, but temperamental, partner. Whenever we approach him over some behaviours he says he is unsupported and overworked, neither of which we think are particularly true for his situation. What now?

A There is always a point in employment situations like these, when relationships have been strained, and passive-aggressive emails have passed between employer and employee over many, many months. But neither the firm, nor the partner or solicitor, are really listening to what the other is actually saying or trying to say. This is the time to bring matters to a head. You have to push forward on these behaviours – don't be afraid of some formality in the process, be precise and firm in your expectations, and wait for the storm that will, I can guarantee, come back at you. That is the moment when progress is made.

Q You mentioned the Government's 'Good Work Plan' in your March column but I'm none the wiser. What is it?

A A long, long time ago the only taxi services in London were black cabs and dodgy overheated mini cabs; when people went to Paris or Barcelona for a holiday or work they stayed in actual hotels; and, in this bygone age, people cooked at home and didn't get their five-a-

day delivered by scooter or bicycle. And in those days, most people in the UK were either employed by a company or self-employed and no one except employment lawyers cared much about anything in between. But then all of a sudden the platform economy arrived, with Uber and Deliveroo, and spread itself all over the UK and the globe. And, all of a sudden, we had precarious employment: within a few years we had thousands of staff who appeared to be employees but were not employees, who were self-employed but not self-employed. The government decided to act. It commissioned a review that came up with something called 'good work' and the Good Work Plan was launched. The only catch is, so far, we are still waiting for the plan to be divulged ... **LPM**



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Q&A

Brand new firm

Q What 'brand considerations' must be taken into account when merging with or acquiring another firm? Scott Brown, digital services manager at Accesspoint, answers

A **FACT:** As firms grow, they evolve. Used correctly, company mergers or acquisitions can be a great way for ambitious firms to attract new audiences and generate exceptional profit. Mergers are complex transitions that focus on aligning equity in a business, shifting perceptions and migrating customers from one business to another. They require surgical precision, exceptional attention to detail and the full support of an entire business community. After all, when M&As fail, the result isn't just the loss of one company, but the potential death of two. Most firms devote most of their attention and resources to the financial, operational and logistical components of a merger or acquisition. Focusing on the implications of how the M&A will affect their brand is less tangible, often put on the back burner or simply neglected. It can be a costly mistake. If the brand is ignored or forgotten during the process, you will be forced to devote even more resources to cleaning up the mess after the fact.

An opportunity for a fresh start

Bringing together two organisations, workforces, cultures and product portfolios is challenging work. Firms are often afraid to disrupt the status quo, terrified that any change could be viewed negatively – taking a defensive posture and keeping their

heads down and working as fast as they can to get back to business as usual. In doing so, they ignore the fact that in many situations change is welcomed. The reality is that you are in the perfect position to be bold and shake things up. It's a chance to rethink the name, identity, brand positioning and tone of voice. And while at first glance this can be a daunting task, it's an opportunity to revisit customer touch points, refine and redefine the customer experience, and drive bottom-line results.

Plan early and plan well

This seems intuitive, but it's often forgotten or left until it is too late. While a lot of research and diligence goes into the M&A process, little is directed at the brands. You shouldn't wait until the ink is dry to start thinking about your current brand and the new one you will be tied to. Instead, you should be creating a brand plan. Do your homework to develop a better understanding of the brand you're merging with and then develop your strategy emerging from the transition. Ask questions and get the facts. What are the market and clients' perception? What are the positive and negative equities and associations? This in turn will help determine whether you remove a logo, change a name or retire a product that has significant overlap in the combined portfolio. Most importantly, look to the brand horizon and keep in mind where you want to be years down the line. You can't move forward without having an idea of where you're going.

Refine and clearly communicate your message for each audience

You need clearly defined messaging for each of your audiences. Existing

customers are concerned with how their experience with your brand will change, and are seeking reassurance. New prospects, however, are now open season for your new offering. Remember at all times to keep your brand messaging consistent to ensure a smooth transition throughout the process.

Additionally, make sure you don't forget your most important audience: your employees. Your employees can and should be your biggest brand advocates as they have the most invested in your success. They need to clearly understand how their role may be affected by these changes so they can continue to serve as a positive touchpoint for customers and be excited and motivated to work for the new combined entity. Successful branding works from the inside out. A brand is just as important as the location of your new offices or your new organisational chart. A brand continues to live long past the final handshake, in the hearts and minds of customers and employees alike. Law firms need to dedicate the attention and resources required to ensure their brand does not merely exist once the deal is done, but thrives in fresh, new and unexpected ways. While it's easy to get caught up in the numbers and financials of an M&A, the truth is that there's more to a successful M&A process than combining balance sheets. The most successful and famous company mergers on the market today achieved their goals because they didn't treat branding as an afterthought. If you're thinking of combining your assets with another company – don't be one of the 83% of mergers that fail. Remember, the companies that brand together, stand together. **LPM**

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In order for businesses to keep their top talent, they need to compete with other employers who are offering a flexible working environment



Nein-to-five

DARREN GOWER, THE TECH GURU

The nine-to-five working week is over. Well, for most people anyway. While some businesses cling to the traditional ways of working, many others are embracing a more modern approach – to give employees more flexibility. This change has been ongoing for a number of years, and now we live in a world where individuals can choose (to an extent) their own working hours and where they work from. Strict schedules, where everybody comes into the office at the same time every day, are becoming less common.

It has been a necessary evolution. People have important things to do outside of work – such as picking up their children from school – and a standard nine-to-five job doesn't offer that flexibility. In order for businesses to keep their top talent, they need to compete with other employers who are offering a flexible working environment.

This is why it's particularly important for SMEs to embrace this type of thing. You need skilled people to help your business grow, but you won't be able to keep hold of them if bigger firms are offering these sorts of benefits.

As a result, flexible working is now incredibly common in the law sector. Firms big and small all over the UK offer their employees different options. Some allow a set amount of working from home days per week or fortnight, others

allow staff to choose their own start and finish times. In what is a very traditional industry, you might be surprised to learn how many law firms are embracing these practices. It's because they recognise that it's not only good for their employees, it's good for them too. A number of studies have shown that it actually increases productivity. So, how do they do it? How have businesses been able to allow flexible working without compromising on the quality of service they offer to clients?

One of the most important things is they have internal systems, processes and procedures that are flexible. Employees need to be working with software that allows them to log in and work from home. They need to be able to access files and folders remotely in order to continue delivering exceptional service.

And they need to be able to communicate with one another. Teamwork and communication are essential aspects of running a successful practice, so there needs to be a way of replicating the closeness of an office space in a remote working environment – which primarily takes place online.

Staff are legally allowed to request a flexible working arrangement once they've been at a company for 26 weeks. But law firms can make this easier, for themselves and their employees, by offering it right away. **LPM**



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Work away

Many firms cap their flexible working policies to working from home one or two days a week, according to a Women in Law Summit 2019 blog analysis of working trends in legal.

89%

say flexible working is their number one motivator to boost productivity

63%

of full-time employees already work flexibly in some way

27.7%

increase in home workers in the last decade

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With so many options now available, clients are becoming blind to what can be done, or needs to be, and so have a tendency to leave it as it is

Cloud complexity

NICK HAYNE, THE DATA MASTER

There is little doubt that cloud environments are getting more complex and for most organisations the use of multi-clouds has increased.

The adoption of multiple types of technology, security layers, vendors and so on, has added to concerns around costs and the fact that there's a general belief that organisations are spending around 30% too much on their usage. And this problem is only likely to get worse.

A recent report by Flexera on the state of the cloud further underpins these concerns by stating, "managing cloud spend and cloud governance are the top challenges for enterprises" and "the number one priority in 2019 is cloud cost optimisation".

Another standout comment from the report was that "39% of cloud instance spend is on virtual machines that are running at below 40% of CPU and memory utilisation, with the majority of those running at under 20%", which highlights how just one area is burning through cash.

Finally, the report highlights that "within the enterprise, most of the responsibility for governing and optimising cloud costs is falling on the central cloud team and the infrastructure and operations team, while business units frequently own the cloud budget".

So how can a managed services provider support the whole issue around usage, costs and optimisation? Well, the new kids on the block are companies and technology providers that address these issues. I can hear the sighs: another technology solution, more costs, more complexity.

But unfortunately, unless you have the skills in-house you will eventually be using these kinds of service.

For those organisations that outsource their cloud to a managed services provider, cost optimisation should be one of the first questions that you raise with them.

The best service providers will continually look at how the estates they have installed and manage can be improved, considering issues like idle instances, underutilised instances, unused accounts, old snapshots and so on, to try to drive as much cost optimisation as possible.

Previously, you never needed to consider some of these issues; your hardware and associated applications were operational and did what they did.

With so many options now available, clients are becoming blind to what can be done, or needs to be, and so have a tendency to leave it as it is, compounding any issues and increasing the overall spend, sometimes simply forgetting that they have services running until a bill arrives that is not factored into the budget.

Couple these issues with the ability for any user on your network to spin up machines or rent solutions without the prior knowledge of IT and guess what, you now have some problems you don't even know you have.

The whole issue around cloud complexity is a particularly difficult situation and for many organisations it is simply getting out of hand, with every chance it is going to get worse before it gets better, unless steps are taken now to take back control. **LPM**



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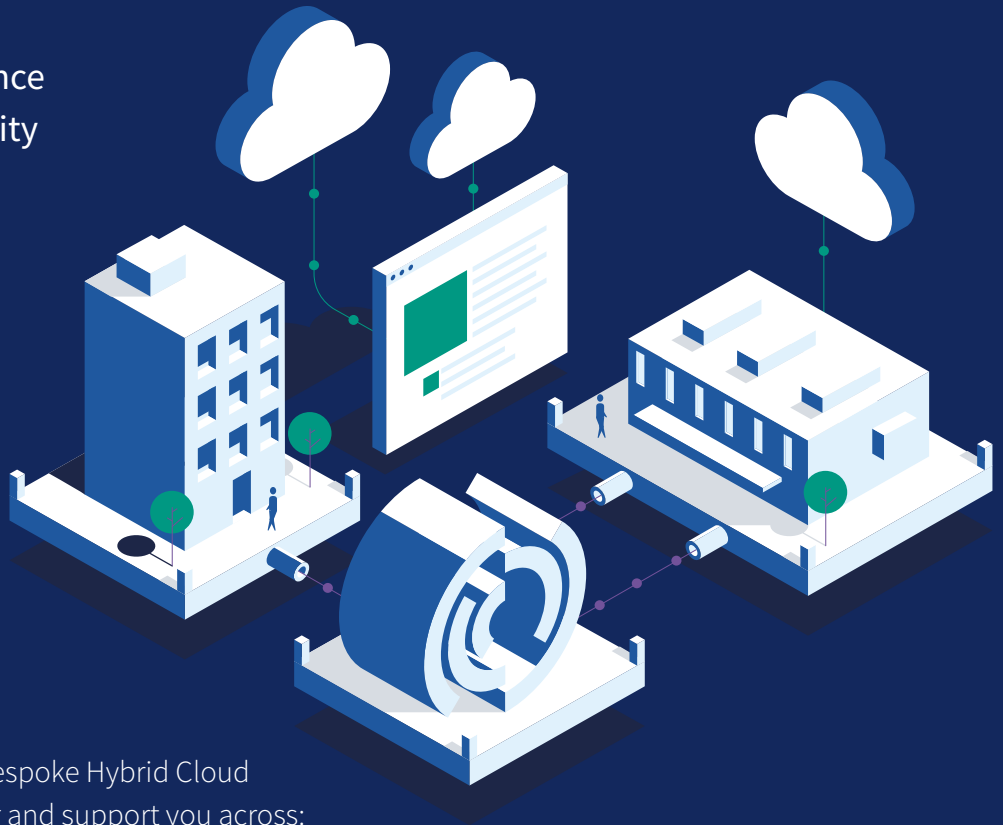
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An increasing number of firms are asking partners to signpost their planned retirement date five years out to allow the firm enough time to implement a well-controlled handover of responsibilities

Quick succession

KATE ARNOTT, THE NUMBER CRUNCHER

If there is one challenge that professional practices struggle with, it's partner succession. There are many reasons, which vary from firm to firm, but there are some key steps that you can take to improve the planning process.

Forward planning is crucial to avoid a cliff-edge situation. An increasing number of firms are asking partners to signpost their planned retirement date five years out to allow the firm enough time to implement a well-controlled handover of responsibilities. This is often also linked to a mandatory backstop retirement age. Clearly these matters require inclusion in the partnership deed and are highly emotive, but it's critical that there's open discussion of them. A mandatory retirement age should not be necessary if the firm has robust appraisal and measurement systems in place to ensure the contributions of all partners remain strong – which, in our experience, is generally not the case.

This forewarning is not only important to get the right people in the right places, it also allows the firm to plan for the financial implications of retirement. The repayment of capital and current accounts, particularly if there's a bunching of retirements, can put a huge pressure on cashflow. This can be mitigated by setting out a phased repayment basis over, say, a five-year period in your partnership deed.

While thinking about the partners that are leaving, the firm must also constantly be monitoring and developing future talent. The grooming of future partners and leaders should be built into the strategy of the firm, with the aim of exposing team members to the sorts of challenges they will face and enabling them to develop a focused, leadership skillset.

Often, the 'stars of the future' leave a firm at

the wrong time, but this can be because no one has told them that they are considered to be a leader in waiting. Senior qualified staff are highly valued in the market, and therefore you should really think about incentivising and motivating them to aid the chances of retention. This is not a case of simply throwing money at a problem. Rather it's managing the expectation of the individual showing leadership potential and commitment.

Finally, an area we regularly see overlooked is the governance arrangements of the firm. As well as getting the detail of the partnership deed right, partners should also take time to think about whether the governance arrangements remain fit for purpose. Too often the structure of a firm has been carried forward over the years without challenge, but in an increasingly fast-moving environment it's healthy to reconsider governance regularly. For example, what are the responsibilities and powers of board members? How many people are on the board? Should board members also retain fee earning work? Is there any oversight of the board? Should a non-lawyer FD or CEO be considered? And so on.

In order to facilitate these matters, it can be helpful to use a third-party adviser that has the benefit of being able to look through the politics and history and canvas real opinions. We have used a system of interviewing all partners in relation to succession planning and governance changes and it is obvious that, behind closed doors, partners are much happier to say what they really think. Consequently the outcomes are more robust.

If you would like to discuss any of the points raised in this article in greater detail, a member of the professional practices specialist team at MHA MacIntyre Hudson would be pleased to talk. **LPM**

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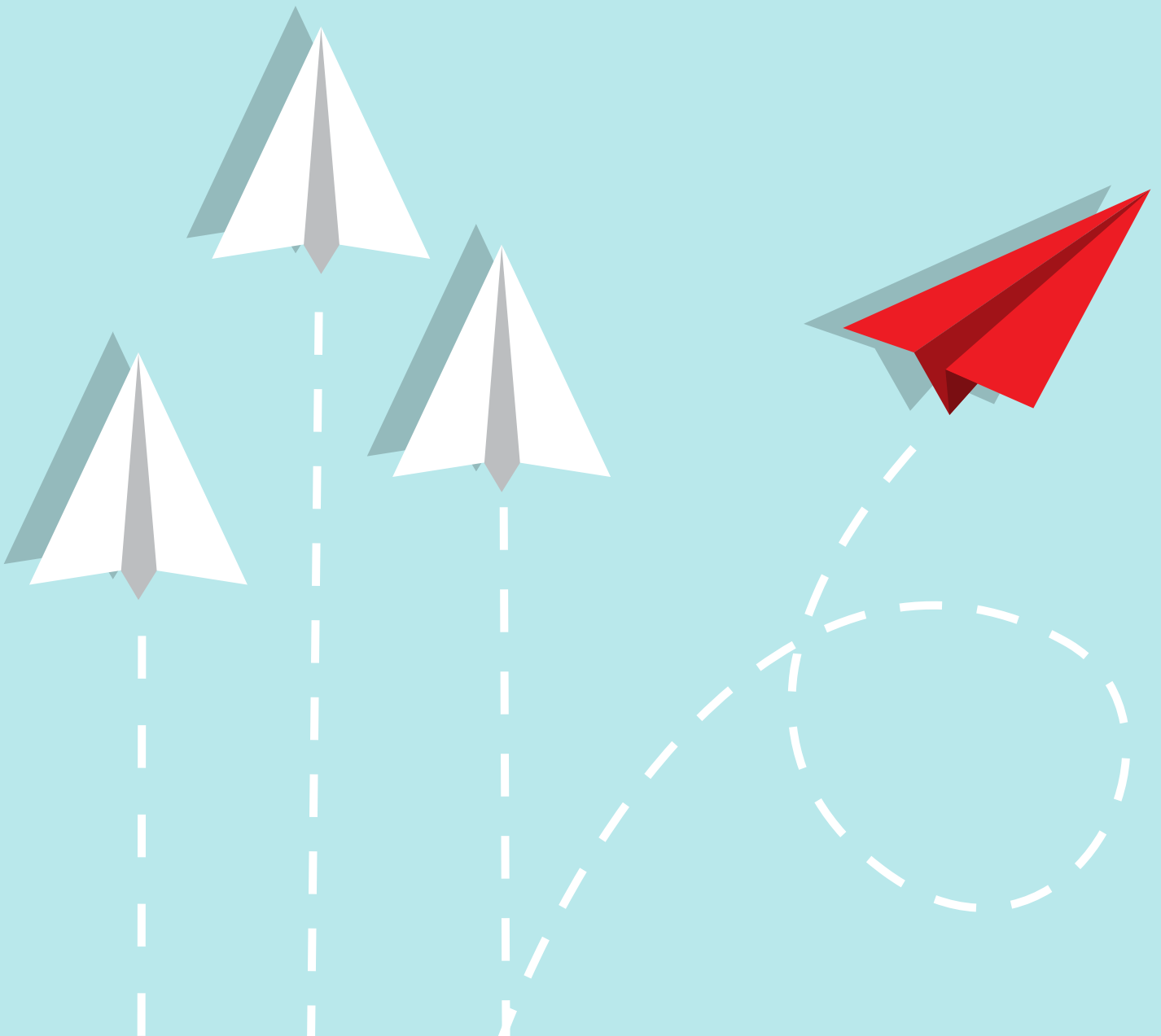
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FEATURES INDEX

POWER TO YOUR PEOPLE

**14 FEATURE**

Flex the small stuff
SME firms' employees are increasingly unchained from the office. Josh Adcock investigates the lengths to which firms have gone to become more agile

18 LPM EVENTS

LPM Practice Excellence Awards 2019 winners
Kayli Olson checks in with the winners of the inaugural LPM Practice Excellence Awards, **Ramsdens** and **Harold Benjamin**

Flex the small stuff

The world of work is moving inexorably towards being more agile, and SME law firms are no exception to the phenomenon. Josh Adcock reports on how firms are rethinking work and their business strategies

The idea of flexible working, whether that's working at home or working remotely elsewhere, is not exactly groundbreaking in 2019. Nevertheless, as the UK workforce's expectations of what work should be like, as well as the demands of an increasingly globalised client base evolve, SME law firms might one day look around and find themselves wondering how and why everyone else has suddenly become 'agile'.

But it's not easy to understand what agile means to law firms, as its definition, and how it can be distinguished from mere flexible working, is itself pretty hazy. What it definitely is, however, is a part of the 'new ways of working' that many groups and organisations have been describing and calling for. And a number of SME firms are beginning to consider these open vistas of work.

FOLLOW THE CLIENT

At Taylor Vinters, HR director Chrissie Easom explains her interpretation of agile as having the technical infrastructure to work effectively anytime and anywhere. But she feels that, no matter how they're defined, the drivers for both come from the same two places. "It's about meeting the needs of our clients and our workforce."

She says that allowing staff to work flexibly, at the times that suit them, need not run counter to the business's needs.

"Our clients are international – they work across multiple time zones and they don't know where, or when, we're working. We should be able to provide them with a seamless service, irrespective of whether we're in a client office, one of our offices, the coffee shop or at the kitchen table."

The firm has taken that philosophy to heart, evolving its policies and culture over the last 10 years. Easom says: "In our contract of employment, we don't have core hours. We state that you're expected to work 'full contribution'.

We care about the outcomes we're achieving – so there's a high degree of autonomy across all staff."

Tiggy Clifford, founder and partner at Torque Law, says that her firm, which specialises in employment law, also sees business benefits in allowing staff to work outside of the traditional hours.

"We do a lot of work for senior executives departing from their employment. It can be pretty awkward for them to have conversations with us during a working day – we're genuinely open to having those conversations as and when they crop up. We also do quite a lot with businesses in America, and we're able to collaborate outside normal UK working hours."

PERSONNEL MATTERS

On top of meeting clients' needs, however, firms are realising the need to make work 'work' for their staff. Flexibility is crucial to serious injury firm CFG Law's business model, says CEO Richard Clark. "The main limit on growth in our business is quality of people. We want to recruit the best people, and the best people have lives outside of work. You've got to accept the fact that people want flexibility and want to work remotely – that's just the modern world."

Clark says there can be a variety of reasons for wanting to work from home or elsewhere. "It could be down to personal circumstances, such as childcare or looking after a relative, or just that they want to get their head down and focus."



We want to recruit the best people, and the best people have lives outside of work. You've got to accept the fact that people want flexibility and want to work remotely

Richard Clark, CEO, CFG Law





LPM FIRM FACTS

Torque Law
Revenue: £350,000
Corporate status: LLP
4 fee earners, 6 total staff
Office: York

We tend to ask ourselves: ‘who do we want and what can they bring to the party?’ Our approach has always been to work out what we want to achieve and, therefore, work with the employee to get the skills we need

Tiggy Clifford, founder and partner, Torque Law

wasn't compatible with their family lives. They're hugely talented lawyers who would have been permanently lost to the profession – because we've been able to accommodate them, we've retained their experience for our firm. Otherwise we'd have needed to go out and recruit somebody at a much more junior level."

Clifford says that, although the firm doesn't have codified flexible working policies, accommodating employee needs has been critical to her firm's success from the get-go. "We tend to ask ourselves: 'Who do we want and what can they bring to the party?' Our approach has always been to work out what we want to achieve and, therefore, work with the employee to get the skills we need."

All it really requires, Clifford suggests, is a little outside-the-box thinking. "We can tip things on their head – rather than think about how to carve up a full-time job, we can make it fit for the employee and the business."

LPM FIRM FACTS

CFG Law
Revenue: £4.5m
Corporate status: Ltd
46 fee earners, 75 total staff
Offices: Cheadle, Manchester (from August 2019)

It's not always about policies, either, he says. "If you provide flexibility, some of it is about the culture of your business and what you're prepared to do to help people."

The competition to attract and retain talent is unlikely to get any less intense or critical to law firms' long-term strategies in the near future, he says.

"Millennials will be 50% of the workforce by next year – and many of them are already very agile. They're also a really capable group of people, and one that will become more demanding. If you try to fit them into your traditional law firm model of sitting in an office, and expect them to work until midnight for a promotion, you've fundamentally lost it."

Easom at Taylor Vinters agrees: "Autonomy is an integral part of what most individuals are looking for when you think about flexible working. We've done an awful lot as a business to be clear about our identity and what our proposition is for individuals."

But enabling flexible and agile working is not only crucial to retaining the younger generation. Clifford at Torque Law says that in some cases the traditional law firm's working patterns and core hours can force out otherwise extremely valuable staff.

"We have two solicitors working for us who both previously left private practice because it

GADGETS GALORE

Alan Barrett, head of IT at TWM Solicitors, says that having the right technology and processes to enable staff to work to their full potential, regardless of location, has been a high priority. He says that consumer technology, in addition to what is technically possible for businesses, has contributed to employee demands – and people expect to be able to work on a variety of devices.

When Barrett joined the firm he was able to share his knowledge of virtual private networks (VPNs). "A few people had VPNs but weren't really utilising them. I rolled out the system, demonstrated it, and it snowballed."

The ability to work remotely has had a transformative impact on certain areas of work, he says. "I witnessed a court case last year where my colleagues were struggling to work in a court environment that had no power sockets and no wifi. So, I came up with a tablet-based solution – now, they can work on 4G connections and

review case notes there and then.”

Similarly, Clark says his clients are spread across the country, and that having the technical capability to work remotely can be critical to delivering the highest standards of work. “If we have colleagues going to a client’s house for a meeting, I want to know they can work properly in that environment, not just write notes on a bit of paper and then travel back to the office to type it up – that’s just wrong.”

In order to facilitate agile and flexible working, Clark says that CFG recently changed its technology provider. “It’s very much been an evolution rather than a revolution over the past six months,” he says.

CFG chose to move to the cloud, which has allowed the firm to roll out a set of applications consistently across the business, including its case management system and Microsoft applications. “The price of that architecture is much cheaper than it was – it’s now accessible for SMEs. Five years ago, even big firms couldn’t afford this kind of platform.”

Barrett, at TWM, has also made some changes to IT provision, during his time at the firm. “We use Syncline computing, which works for the firm’s security and cost needs. It allows you to use very cheap equipment to talk to a very powerful centralised server. Now, we can enable nearly everybody within the business to work remotely – we can support people that have come back to work after having families, allow staff to work part-time, and help those who want to work flexibly to do so.”

CHANGE IN ATTITUDE

Rethinking the relationship between law firms and their employees is crucial to becoming agile – and that involves a lot of cultural change. Foremost among those priorities is trusting employees, says Clark at CFG. Although he found little resistance from within his own business, at other firms he’s heard of real reluctance to trust colleagues to be agile workers.

“I’ve met with senior partners elsewhere who feel ‘if I can’t see them, what are my people doing?’ I’ve heard these concerns before, but my view is if you don’t trust them, why employ them?”

Clark also says that a significant proportion of colleagues still come in and work typical office hours. He also encountered misconceptions about flexible working, suggesting that the reality of agile working hasn’t yet quite filtered through to absolutely everyone.

“The people who choose to come to the office every day struggle to believe that if somebody’s working from home they’re actually accessible. Even now I still hear a little bit of ‘I know you’re working at home tomorrow, so I’ll try not to bother you.’”

Clifford at Torque Law says that the reticence in law firms to allow flexible hours or remote working is partly to do with the phenomenon of presenteeism. “There’s very much an ‘hours sitting at a desk’ bias, a focus on billing targets and chargeable hours rather than results output.

“The firm I was at prior to setting up Torque placed a great expectation on being at my desk from 9am to 5.30pm. There wasn’t a willingness to see the efforts I was putting in outside those core hours.” In fact, she says getting around that lack of flexibility at more traditional firms was a key driver in setting up Torque Law.

At Taylor Vinters, Easom says the move towards agile has been a journey, with an accompanying shift towards outcomes-based strategy. “It’s been a cultural shift, and a work in progress. We’re now a very focused, values-driven business – we’re all adults, we all know the right thing to do.”

But Clark at CFG points out there are still cultural challenges presented by agile working that have yet to be fully explored. “How you manage people working remotely is very different to when they’re in the office. The team dynamics change. For the legal industry that’s quite a challenge, because firms often struggle to manage well as it is.”

DESK POLITICS

While Clark says it’s likely that CFG will eventually employ people who hardly ever come to the office, it’s also important for staff to feel part of the business and to understand its culture.

“We have about 30 new people starting over the next nine months, and they will all start off in our offices. The worst thing would be a situation where you meet a new starter once and then never meet them face-to-face again.”

Nevertheless, he says that CFG’s new central Manchester office, opening in August 2019, will include hotdesking, and the entire firm will be going paperless to facilitate frictionless integration between its sites.

Easom at Taylor Vinters says that everybody currently has a desk – but that may change in the future. “Understanding the emerging needs of both our people and our clients is key to evaluating what sort of environment works best for us, and we’re always open to reassessing what that means in practical terms.”

Barrett, on the other hand, feels that TWM is unlikely to move away from its permanent physical presence. “We’re a traditional law firm. People want to come and see us in a local office – they want to feel that we’re grounded and rooted in the local area. But I think increased flexibility is what firms are going to be focusing on more.”

He also says that the firm doesn’t currently have plans to implement a hotdesking policy in terms of its facilities, but could “theoretically” easily do so in future, as the technological infrastructure is already there.

Flexibility, and having the imagination to re-engineer until now immutable ways of working, look like they’ll prove to be significant for the future of SME law firms. “Agile is more a flexibility of approach, rather than just adjustable hours or location,” as Clifford at Torque Law puts it. With the competition getting fiercer, and employees more demanding, bending the so-called ‘rules’ may yet rule the future. **LPM**

LPM FIRM FACTS

TWM Solicitors

Revenue: £17.4m

Corporate status: LLP

90 fee earners, 235 total staff

Offices: Guildford, Wimbledon, Fulham, Epsom, Leatherhead, Reigate, Cranleigh

LPM FIRM FACTS

Taylor Vinters

Revenue: £19m

Corporate status: LLP

100 fee earners, 150 total staff

Offices: London, Cambridge, Singapore

LPM PRACTICE EXCELLENCE AWARDS

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CATEGORY ONE PEOPLE AND ENGAGEMENT

Winner: Ramsdens

For the Ramsdens Management Programme (RMP) – a modular L&D programme for developing and embedding skills and confidence in business development, client relationship management and leadership

Interview with: Paul Joyce, managing partner, Ramsdens

Q What was the drive behind it?

A Five years ago, we had an equity partnership that was thinking about succession. We felt we needed to start to train some of our younger people and give them some exposure to management. So, we devised a programme that would give associate-level staff some formal training. It develops new skills for them and creates a pathway for the firm to progress them as well. It's also enabled us – with the assistance of objective third parties – to identify who were suited for management. Because it's one thing being a good lawyer and a very different thing being a good manager.

Q How is it run?

A Our HR manager and marketing director look after the programme together. They organise the seminars and pull everything together. The actual seminars are run by an external consultant and supported by senior members of Ramsdens' management team. It's a year-long programme with bi-monthly half-day sessions, and in the last section the participants have to do a presentation in groups to a panel of partners. We've also set up a follow-up programme that happens the year after for participants. This was created for two reasons: to keep participants interacting with each other – it's great to get them networking

with people from different departments and offices – and it also allows them to network with external people. We'll have a bank or accountancy firm give presentations about their sector, giving our participants a chance to hear about how our firm fits in the wider professional services sector, as well as time to network.

Q What's next for the project?

A Following the success of the RMP, we launched the Ramsdens Leadership Programme in May 2019. The makeup of this group of junior partners demonstrates the breadth and diversity that will underpin our future success. We actively promote a culture of learning within the firm and these programmes exemplify our strong commitment to the development of our people.

Q What are the outcomes?

A We've seen a real benefit as the first cohort had quite a number of people and it has really gained traction. To date, 35 employees from across all departments have successfully completed the programme. As it's focused on management it's not only benefiting our staff by upskilling them, it's also great for Ramsdens – for attraction and retention of our talent and providing a solid foundation for succession. Being a manager is not just about doing the role, it's about managing the business. **LPM**

Photography by Dustin Smith

From left to right: Natalie Morrison, partner; Veronica Mullins, partner; and Paul Joyce, managing partner, Ramsdens



LPM awards launch

At LPM North in Leeds on Wednesday 15 May 2019, the winners of the inaugural LPM Practice Excellence Awards were announced – in partnership with the Institute of Legal Finance and Management.

They were awarded in two categories: people and engagement – given for a people-focused initiative, change, programme or similar that demonstrates excellence in human capital innovation or employee engagement; and legal service delivery efficiency or innovation – given for a programme/process/business change improving the firm's effectiveness and efficiency.

We launched the awards as a way to recognise excellence in the management side of legal business. It was judged by a panel of people like you, in legal management roles across practice management and operations. Read up on the winning firms here.

Missed out this year? Don't worry, LPM Practice Excellence Awards will be back in 2020!

LPM PRACTICE EXCELLENCE AWARDS

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CATEGORY TWO SERVICE DELIVERY EFFICIENCY OR INNOVATION

Winner: Harold Benjamin

For its IT project using LEM Verify, a web-based pay-as-you-go platform to automate and speed up identity checking

Interview with: Jamie Abrahams, IT and operations director, Harold Benjamin; and LEM Verify co-founders and directors Oliver Fattal and Paul Laight



From left to right: Briget Harrison, business development and marketing director; and Jamie Abrahams, IT and operations director, Harold Benjamin

Photography by Dustin Smith

Q What anti-money laundering obstacles did you solve?

A **Jamie says:** Funnily enough, law firms probably need to be a bit braver about embracing new ways of working to overcome the challenges of the risk posed by identity checking. We feel better about risk now. I've never been a big fan of the current methods around anti-money laundering (AML) checks. The LEM Verify platform ensures our clients' onboarding experience is faster with little inconvenience. The reporting is fully automated and accessible in real-time. Our client's AML and identity-checking experience has vastly improved as it means it can perform the check without attending our office, saving time and money. We were speaking to a firm recently that would get sent a photocopy of someone's passport via a third party, which – although is done in real time with the client present for the scanning of the document – still gets stamped, signed and then rescanned. If the document is a driver's licence, by the time it makes its way through the process it's completely illegible. Having some more focus on the problems of identity crime, rather than just AML, was really key. We now integrate into better datasets, focus more on training our people and on using technology. But law firms are still only one part of the process. We still have to explain to our clients that this will get them through our process, but they still have to go through the

banking people and others depending who they may be borrowing from. The question for firms is whether or not you can trust someone else's verifications, but if you dig too hard you actually start to transfer the liability to yourself. On top of it, if you do find something and report it to the Solicitors Regulation Authority, it takes time to investigate.

Oliver and Paul say: For our business it was really helpful to work with Jamie. We gained a lot of insight into the requirements and regulations for the legal sector and we have been in a position to implement new creative solutions to improve our offering further. We wanted it to be as easy to use and accessible as possible. You can send out the verification to your clients, access a number of reports and connect it to third-party systems. We can link it to systems such as Slack, Dropbox, SmartSearch and HighQ. The dashboards, reports and integrations are all customisable to the needs of the practice. Clients get sent a link via email or SMS, which sends them straight through to the test without having to download anything. Instructions are clear and the process is as swift and painless as possible, so they feel like they're in and out of it in a few minutes. All it takes is a picture of their documentation and a video recording of them saying a few words followed by some head movements.

Q What are the outcomes for the future?

A **Jamie says:** From a risk management perspective, we pitch to our insurers every year. Most firms simply accept what the insurers offer. I'm expected to stand in front of PI insurers and tell them why we're better and less risky than others and identify the different types of innovation and IT projects in the mix for the firm going forward. We've been able to keep our premiums low even as we grow up to three times the size financially, resulting in our PII being proportionately static.

Oliver and Paul say: We are very excited about the future of our product. As a company we take privacy and GDPR very seriously and we ensure that all our customer data in our servers is deleted within seven days. We've also just released a redaction solution that further enhances this offering by removing unwanted personal information from identity documents – for example, passport numbers or issue dates, allowing records to be retained under basis and data minimisation. We also have more products in our pipeline coming soon and we look forward to developing our offering further for the legal sector. **LPM**

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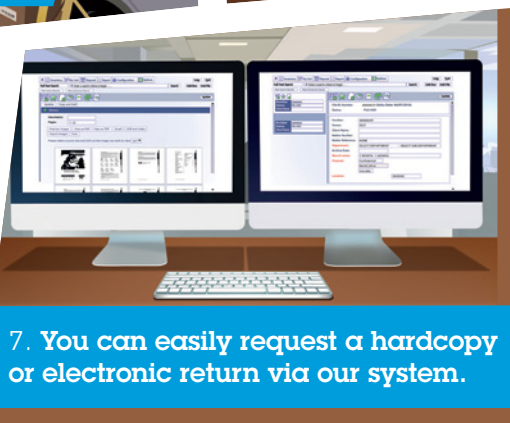


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LPM

LEGAL PRACTICE MANAGEMENT

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A SOURCE OF COMFORT

How do managed services and outsourcing fit into the IT strategy at SME law firms?

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WELCOME



Managed services and outsourcing have been a big area of opportunity for SME law firms to improve their operations for years. Back in 2017, LPM explored how managed services and outsourcing could be of benefit by looking at a range of outsourcing options and the outcomes for firms. This time, we're diving into the wider IT strategy and day-to-day operations as well, and asking where managed service providers come into play.

The story has always been the same – SME law firms can't expect to be experts in technology as well as running a high quality of legal service for clients. But the two are unequivocally interlinked – with technology becoming more integral to the smooth operation of any business, legal has a lot to win. It's often been said that firms have to run to stand still – but for those with a small IT team, or perhaps none at all, they may have to work even harder. Managed services, outsourcing, cloud (oh my!) – how does it all fit together and make the IT function fit for the future?

FEATURE

24 How do managed services and IT strategy work together in SME law firms?

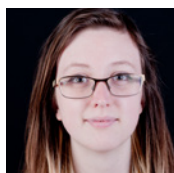
INDUSTRY VIEWS

28 Andy Bevan at **Pulsant** on choosing and building a relationship with a managed services provider

32 Nick Hayne at **Quiss** on some pointers for SME law firm IT management

Kayli Olson, editor
@LPMmag | kaylio@lpmmag.co.uk

Contact us



Kayli Olson is editor. A Kingston graduate, she has spent most of her time in the UK picking up British slang, playing board games, drinking bitter and showing us 'how it's done'.
kaylio@lpmmag.co.uk



Jem Sandhu is LPM's features writer. She's a cool copy-cat who discovers stories and advocates for professional grammar.
jems@lpmmag.co.uk



Josh Adcock is LPM's editorial assistant. Aside from assisting editorially and writing the occasional article, he's trying to introduce more satire and nerd references into LPM.
josha@lpmmag.co.uk



Sarah Cox is Burlington Media's client services director. Want to get involved in LPM? Contact her on:
sarahc@lpmmag.co.uk



0800 014 2445 or LPM@LPMAG.CO.UK
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Tech mate

How do SME law firms juggle multiple technologies day to day and where can they leverage managed services in their IT strategy?
Kayli Olson reports

It's almost impossible to be a player in the market, any market, in this day and age without using technology one way or another. Technology is so ingrained in life and work in the 21st century that businesses that don't have a strong grip on their day-to-day running of technology and operations, well-trained staff and relationships with vendors will not make it very far.

One could go so far as to say that IT strategy should lead overall business strategy. After all, it's the IT strategy that will maintain high quality of services for clients and a hassle-free working environment for staff. So what's it all look like in the SME legal market?

Jamie Lawrence, head of IT at Grant Saw, says: "Our overall IT strategy is driven by three factors: improving efficiency and client service, data security, and ease of use by our staff.

"And we don't want lots of unused licences for things that are of little practical use. We're committed to the idea that IT must be our servant, not our master."

Coincidentally, Michael Burne, founder and CEO at Carbon Law Partners, says the same thing: "There's still hype in the market around artificial intelligence, but I think it's the rise of 'real intelligence' that will be the most rewarding. If we use real intelligence and ask fundamental questions about how to enslave technology – not to let ourselves be enslaved by it – that's how we can best leverage it to serve our clients."

He adds that SME law firms need to learn to guard themselves against "shiny bauble syndrome" and concentrate on what actually matters, which is the client.

STRATEGY, STAT

What are some ways SME law firms are servicing their clients using technology? It comes in all shapes and sizes – but some key themes from this topic have been relationships with managed services providers, strategic outsourcing of

functions, use of cloud-hosted environments for smooth running of services, and a keen eye on security. It's a lot to think about for a little fish with big ambitions, but it doesn't have to be overwhelming.

Because of Carbon's unique model – it operates from a main hub based in Cardiff with its fee earners working remotely across the UK – everything that a lawyer needs to do their job is done through the Carbon platform. The frontend was designed and built in-house and brings together third-party applications for a specific process functionality that's suitable for the firm.

Carbon has no giant IT team or budget and is able to manage all of this by outsourcing key functions that demand heavy tech engineering capabilities, resource or even just time-heavy tasks.

Burne says it's almost embarrassing how cheap it is per month to run the platform. "There's no financial barrier to innovation, which is often the misconceived obstacle for SME law firms. The biggest thing to work out is why you would be innovating and the benefit for the client."

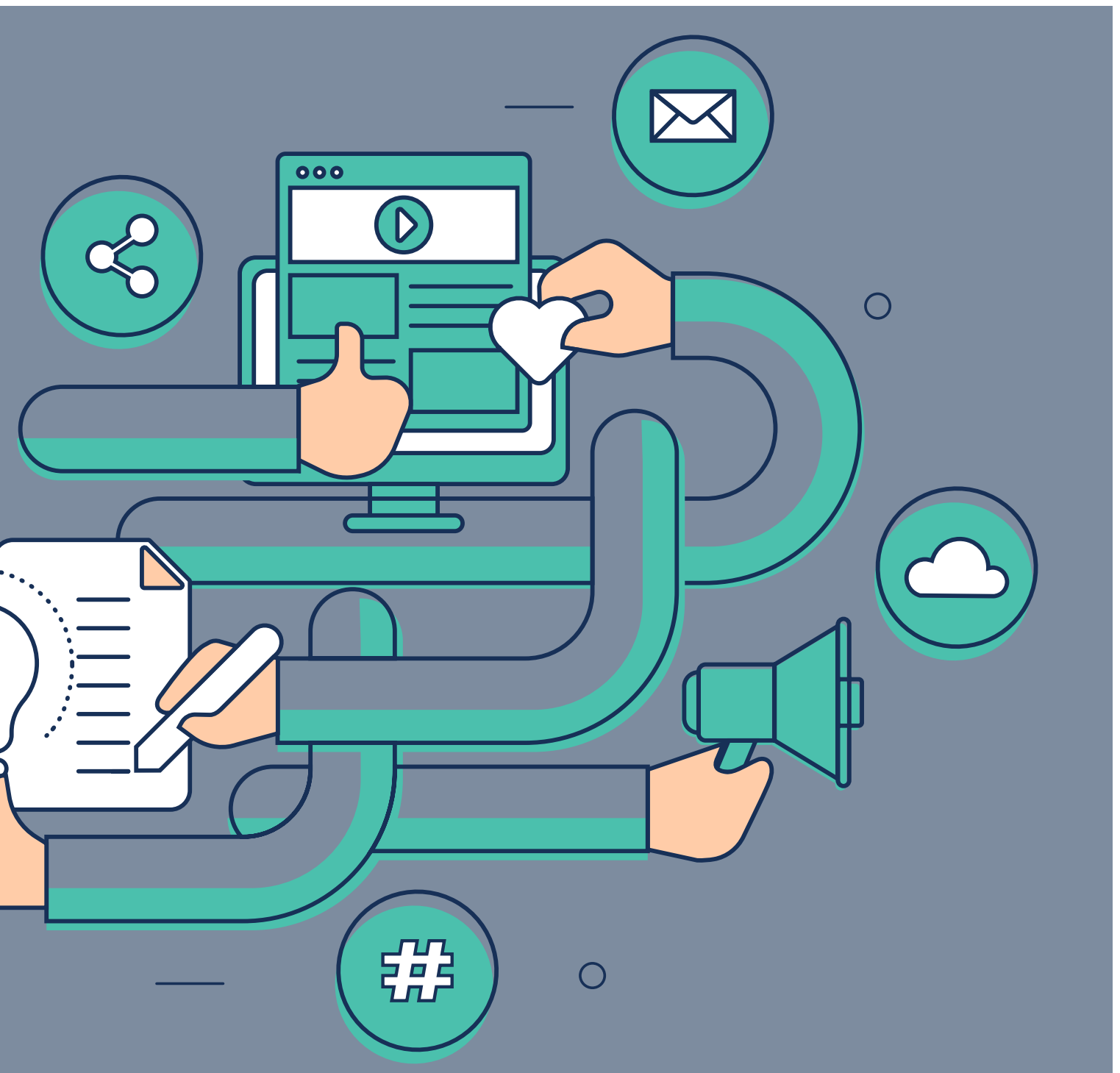
Everything that's linked and run through the platform is cloud-based, he adds. "Our lawyers should be able to access the platform from any device."

Michael McGuire, head of IT at Metamorph Law, has a similar but different challenge – he must



If we use real intelligence and ask fundamental questions about how to enslave technology – not to let ourselves be enslaved by it – that's how we can best leverage it to serve our clients

Michael Burne, founder and CEO, Carbon Law Partners



ensure recently acquired firms are properly integrated and supported by its technologies.

“My main concern is providing a secure platform that will support the firm as we grow. When we acquire a firm, we acquire another network and our solution for getting everyone running in the same environment is to use an infrastructure as a service provider (IaaS) – for us that’s CTS.

“Using IaaS gives us the ability to grow the environment with the firm, rather than having a lot of hardware sitting in a corner underutilised or needing to continually run updates after an acquisition.”

MANAGED CHALLENGE

Carbon has very specific needs, says Burne, everything a lawyer should ever need to do – client onboarding, matter management, billing,

closing and so on – should be on the Carbon platform, easily accessible and ready to use.

“We use ActionStep as our practice management system – it has the configuration functionality we need and a relatively easy way of building workflows, which we outsource to a consultancy as we have neither an enormous demand for building workflows nor the desire to waste our own resource on the task. It’s the functionality we want to get the most out of.”

He says that the platform also has a button that links directly to a provider of paralegals – called F-LEX. Carbon has been using F-LEX for about three years, and the integration with the firm’s platform means that all it takes is a click of a mouse and the lawyer is sent to the online booking form.

And if anyone needs to be retrained on any area of the platform, he adds, there are short



videos available that the firm made in-house.

Lawrence at Grant Saw says he is becoming aware that different departments are using the technology in different ways, so he's talking about having "key-user learning hubs for sharing of information and trying to be more consistent across the firm."

In terms of ensuring a seamless working environment, Lawrence wanted to achieve this by making sure the firm didn't cut corners – and so the firm partnered with Accesspoint Technologies.

"In 2017 we decided to take the leap and move our onsite services to a fully cloud-hosted environment. We knew that in 2018 we would have a total of three office moves, and being able to maintain a stable, secure offsite environment during that time made a big difference."

When the firm was fitting out its new offices in Blackheath and Greenwich, Lawrence says, keeping the IT environment running as smoothly as possible was key. Grant Saw went through an upgrade of desktop machines to brand new Surface Pros and introduced a secure wifi system – which allows lawyers to undock from their desks, go into a meeting room and immediately project onto a screen.

He says: "We went through everything, all the

while staying connected to our cloud environment and not having to worry about setting up or plugging anything in."

At Metamorph Law, McGuire's biggest concern is usually security. "Security can be something that seems expensive until you need it. Firms should look at the security they have in place and quickly address any areas of vulnerability."

THE DAY-TO-DAY

And for an SME law firm, which already has a lot on the go, finding the time to address fundamental issues such as security concerns might, unfortunately, find itself lower down the to-do list if staff have problems with technology day to day.

McGuire says: "I don't have to worry about managing IT and providing support day to day. It is my responsibility, of course, but outsourcing that area is a huge benefit, not just to my time but for the firm overall. Managed services providers have Microsoft-certified and highly experienced engineers. Most law firms won't often have that kind of skillset in-house, unless you're one of the big players."

Lawrence at Grant Saw oversees the day-to-day running of the firm's IT infrastructure, but as a risk



It's more efficient for lawyers to send technology enquiries to CTS helpdesk, and that keeps my team focused where it matters, which is on strategy and any ongoing IT projects

Michael McGuire, head of IT, Metamorph Law

management measure, he makes sure his technology partner knows what's happening in case he is away unexpectedly.

"We bounce ideas off each other if a problem needs fixing. And I liaise with our managing partner and IT partner and other third-party providers to keep our IT moving forward and identify any changes – to infrastructure or lawyer-facing – when needed."

Burne at Carbon says the firm has an outsource relationship with Nasstar, which provides the firm with 24/7/365 helpdesk and telephone support. "We can't have a lawyer who can't work because it's Sunday afternoon and they can't access what they need for any reason.

"We operate a bring-your-own-device policy, so we publish the spec of what our people's technology should be able to cope with and encourage them to think about their business-continuity plan. So, if your laptop doesn't work and it's not an application-based issue, what are you going to do? As a firm, we need to be able to offer our lawyers the support they need remotely."

Similarly, Metamorph Law outsources its helpdesk. McGuire says: "It's a big deal for a lawyer if their digital dictation service isn't working. But I don't necessarily have to worry about any of the issues that crop up day to day, and my IT team is small and dispersed across our offices. It's more efficient for lawyers to send technology enquiries to CTS, and that keeps my team focused where it matters, which is on strategy and any ongoing IT projects."

No matter the makeup of a firm, virtually-based or with staff working in an office and out and about, ensuring that there's a smooth-running working environment is one of the top priorities says Lawrence at Grant Saw.

"People are so reliant on IT now, that if a lawyer cannot access the system, they can hardly work at all. Staff demand a smooth experience when they're in the office but they also want a seamless experience working remotely from a laptop or mobile device, maybe late at night.

"This, of course, comes with added security risks – and with our being an SME, we must always be at the top of our game and make sure we identify risks and resolve them as soon as possible and in a cost-effective way."

FUTURE OPS

It all comes full circle, of course. There are a lot of moving parts to managing IT and keeping a firm afloat day to day in the long term – we live in a digital world after all. SME law firms don't have the time, money or resource to waste time dilly-dallying on minor IT problems, confused lawyers or coding patches into infrastructure.

Increasingly, firms are moving away from paper files – this is true, too, for Grant Saw. Lawrence says that, as the firm continues down that path, it is going to need software solutions that integrate with Grant Saw's case management system (CMS).

"Some may have a wonderful IT product, but if we have to log in and communicate through their portal, and it's not easily replicated in our CMS timeline, it will be hard to prove what use the system is for our clients' benefit later."

The future of law firm technology strategy may be to leave the daily management and support to the providers and turn the focus to data. Burne at Carbon Law Partners says the legal market is becoming more data driven.

"The way we handle data has matured. We're getting good at data analytics, whether that's from social media or web insights, client engagement, staff performance or the business as a whole.

"If you use it wisely and filter it sensibly, it can guide decision-making. However, data is not a proxy for IT; you still need to take a few minutes to work alongside technology."

Grant Saw is working towards a similar goal. Lawrence says: "The key thing over the next 12 months will be improving case workflows and automated documents on the case management side.

"We want to use the CMS to generate really useful management information, which will drive performance and keep our managing partner and heads of department aware of trends and possible issues that they can deal with in advance. This will involve some data cleansing and integrity issues."

There's certainly a lot on the go for an SME law firm. Not every firm has the time or resource to manage IT day to day. The smaller the operation, the more crucial the people and efforts of the firm. And a growing practice needs IT stability and support to grow. When it comes to a solid IT strategy, flexibility and ease of mind, managed service providers and outsourced functions, such as marketing, support and IT helpdesk, may be the wisest choice. **LPM**

LPM FIRM FACTS

Carbon Law Partners

Revenue: undisclosed

Corporate status: Ltd (ABS)

32 fee earners, 44 total staff

Offices: Cardiff, London, Bristol, Birmingham

LPM FIRM FACTS

Grant Saw Solicitors

Revenue: £1m

Corporate status: LLP

28 fee earners, 44 total staff

Offices: Greenwich, Blackheath

LPM FIRM FACTS

Metamorph Law

Revenue: £24m

Corporate status: Ltd

200 fee earners, 435 total staff

Offices: Manchester, Lytham, Chester, Shrewsbury, Telford, Newport, Bristol, Dorchester, Bournemouth, Lymington, Southampton



At your service



Andy Bevan, cloud sales specialist – legal sector at Pulsant, on the uses of managed services providers, where to start and how to benefit

The managed services market shows no signs of slowing down. In fact, according to CRN's 2018 MSP Trends report, IT decision-makers currently entrust an average of 36% of their IT estate to third parties. But this figure is expected to rise to 48% within five years, with factors such as the cloud, skills shortages and increasing complexity of IT cited as key drivers.

Of all the industries impacted by technology advances, the legal sector has arguably

remained the most static and traditional. But with increasing pressure to improve efficiencies, commerciality and competitive advantage, more law firms are turning to managed services for support.

But with a plethora of options available, where do you start, what services should you outsource, how do you select the right provider and what do you need to know before embarking on a managed IT services strategy?

A ROLE TO REMEMBER

IT managed services often means different things to different people, but in essence it is the outsourcing of IT management and services. In the context of an IT service, the 'managed' component can be as much or as little as your firm requires and will depend on a number of factors such as: if you have your own IT team, where you want to locate your physical hardware and how much support you need with areas such as licensing, end users and networking.

The answers will not be the same for every firm. A small practice may have very little expertise and require a full end-to-end managed service providing networking, security, hardware, licensing, IT end-user and deskside support. On the other hand, a larger practice may have an internal IT team and only need a provider to supply space, power, cooling and physical security for its own equipment.

Most firms will find themselves somewhere in the middle but, whatever your situation, it's likely that you could benefit from some type of managed service. You will probably already have access to IT support that understands your bespoke applications and appreciates the needs of your fee earners in great depth. However, you may also find tasks such as the day-to-day provision, maintenance, patching and support of core systems an unnecessary overhead.

WELL-CONSIDERED

It's not just the day-to-day maintenance and support of IT systems that may be causing you headaches. Today, the pressure is on to stay knowledgeable on the appropriate hardware and software for the sector, as well as ensure IT systems and processes adhere to changing regulations and meet evolving client expectations.

Staying on top of all of the above takes time, effort and money. As your core focus is on providing legal services to your clients through a group of high-value specialist employees, it makes little sense to dilute your competencies by becoming experts in IT services too. In addition, your firm may not be large enough to sustain an IT department to support your users and maintain your equipment on a 24/7 basis.

Location is also an important factor to consider. Many firms are based in high-street premises, often with little to offer in terms of resilience and security. Burglary, poor fire protection and a lack of reliable power or air conditioning can be a very real threat to your practice.



A small practice may have very little expertise and require a full end-to-end managed service providing networking, security, hardware, licensing, IT end-user and deskside support

Your IT equipment is critical, and you need to ask yourself how you would cope if any of these threats materialised. It's unlikely that you could go back to a paper-based system, and quantifying the disruption to your practice is difficult to imagine.

If any of these issues are relevant to you, then it is certainly worth considering a managed IT services approach.

STARTING LINE

When considering an IT managed service, you should always start with the outcomes you need to achieve. For example, if you need to buy a car to transport a large family or raft of equipment, it wouldn't make sense to purchase a two-seater convertible. The same principle applies when adopting managed services – match your solution to the desired outcome.

Before approaching a managed service provider, you need to consider your minimum requirements in terms of security, resilience, reliability, scalability and service.

While the security is paramount for any business, resilience and reliability requirements may differ between firms. But the cost of not being able to work because of downtime, or to produce the right legal document when needed, are hugely important factors that should be considered.

Your scalability outcomes will depend on your growth aspirations and service outcomes will be influenced by whether or not you have IT staff who can support your fee earners in the evenings and at the weekend, as well as during the working week.

Once you understand your desired outcomes,



You should either obtain independent advice, or an analysis and solution from your chosen managed IT services vendor, to ensure that you don't fall foul of a licence gap when you migrate

you can focus on the spectrum of services that you need from a managed service. Acquiring a colocation service provider to house your IT equipment may be enough to meet your outcomes. Or you may require a fully hosted datacentre service, where the provider delivers and manages all of your datacentre services on a rental basis. Some firms may require staff on the ground to assist users within all their offices.

POSSIBILITY POWER

The next step can seem like a simple one – transacting with the service provider for a service to meet your outcomes. But, although this goes without saying in the legal sector, detailing every element of the managed service is vital. It's also equally as important to request a detailed breakdown of what isn't included and when third parties will need to be involved.

Also, in the hosted managed service world, it's critical to understand your licensing position. Do

your third-party application vendors need notification if you move your software to another location? For example, when looking at Microsoft licensing, do you know whether you can migrate your existing benefits to a cloud solution? You should either obtain independent advice, or an analysis and solution from your chosen managed IT services vendor, to ensure that you don't fall foul of a licence gap when you migrate.

It's also critical that you fully understand how any charges are calculated and billed. For example, if you exceed the initial subscription, then you need to know upfront how much you will be charged for additional storage, an extra server, or more professional services if required.

The service level agreement also needs to be examined carefully and you need to ask questions such as: will the hours meet the needs of your users, does the commitment on availability of services meet your business needs and will response timescales suit your requirements? Additionally, what recompense will you be entitled to if they fail to meet these commitments?

ALL OR NOTHING?

If moving to a full managed service straight away is a step too far, too soon, then there are some point solutions to consider before making the complete transition.

The first, and perhaps most obvious, area to consider is Microsoft Office Exchange Online. It's a monthly subscription service, hosted in the cloud by Microsoft, and it offers the same

features as your own Microsoft Exchange. It removes the need for ongoing management of data storage in-house with a 50gb mailbox per user and in-flight upgrades meaning that you'll no longer need to be concerned about Exchange upgrades in future.

Cloud-based services can also be adopted as point solutions, and these services fall mainly into outcomes around compliance and security. In this arena there are many options, some of which include:

- Managed cloud-based data backup services, which ensure you have a copy of your data held securely in another location
- Managed disaster recovery services to get your infrastructure up and running quickly if your on-premise solution is catastrophically damaged
- Email protection and archiving services which protect your end users from malware, spam and viruses
- Web protection services, which apply policy to end-user browsing, ensuring that your desktop and laptop machines aren't compromised by website malware.

THE RIGHT APPROACH

Clearly, it's difficult to predict every possible scenario and therefore every required outcome. However, it would be unusual if you couldn't see the benefit of some form of managed IT service. It may not be appropriate for all

situations, but there are many where this approach can provide value to your business. Some of these include:

- If your on-premise server estate is coming to end of life and it requires significant capital to refresh it
- If your software is reaching end of support and you are unsure how to keep your business running while you upgrade your IT estate
- If you are finding the demands for longer coverage hours are exceeding your IT team's ability to support it and there is no budget to increase your headcount
- If you are about to embark on a major upgrade project and do not have the IT capacity and in-house expertise to carry it out
- If you are planning on an acquisition and do not have the resources to support the new, larger organisation going forward
- If the demands of the business exceed your ability to provide the required service levels.

Not only can a managed services approach provide the answer to the challenges above, it can also allow you to focus on what you do best, as well as providing you with the peace of mind that your outcomes are being met.

You may not want to jump straight into a whole portfolio of managed services, but asking yourself the right questions and starting the conversation with a trusted partner that understands the legal sector is a good place to begin. **LPM**

ABOUT US

Pulsant is a leading provider of hybrid IT solutions, including managed cloud, professional services, datacentre and infrastructure services.

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HOW DO YOU MANAGE?



Managed services providers can help law firms navigate business trends, but firms should look closely at how they select their IT partners, says Nick Hayne, head of professional services at Quiss

Whether it's transcription and typing or marketing and managed IT services, outsourcing support can offer law firms productivity and profitability gains when compared with the typical in-house options.

Although some firms will engage specialist consultants to help them select a managed IT service provider (MSP), the choice may be simpler if the provider not only addresses the firm's current IT concerns but also has the prescience to see likely market movements and challenges, while also behaving as a responsible business partner.

Here are a few trends and questions that it might be helpful to take into account when contemplating your potential MSP relationship, along with which technology topics ought to be up for discussion when meeting prospects face to face.

GOING ROUND THE TREND

When you sit down with your board or your consultants to draw up a list of suitable MSPs, you need to understand if the selected firms offer more than just a list of services. Do they truly understand the direction of their industry or what impact future trends and changes in technology are likely to have on your business, for the duration of the potential relationship? There are several key trends that they should raise as topics of conversation, upon which your decision-making should hinge.





1 Stay secure

While many of the trends are positive, the most important focus will be on the negatives of cybercrime. It is critical your selected MSPs truly understand the risks law firms face and offer a comprehensive service to defend your business – and aid in recovery if, or when, the worst should happen.

It's a recurrent message, and perhaps that's part of the problem, as some firms choose to ignore the very real threat and hope the storm passes them by. However, recent research underscores the scale of what's happening. In 2018 alone, £354.3m was stolen via authorised push-payment fraud, with criminals using social engineering and phishing attacks to steal victims' money. That's a 92% increase on the 2017 figure.

These statistics are more starkly illustrated by the fact that, according to the government, around 1,400 criminal organisations are currently targeting the legal sector, exploiting out-of-date or inadequate security. The 2018 figure will therefore represent a further increase.

If that's not scary enough, the Cyber Security Breaches Survey 2019, released by the Department for Digital, Culture, Media and Sport (DCMS) found that at least 80% of businesses had experienced sustained and frequent phishing attempts last year. Ironically, there seems little to discourage criminals, with only 1% of UK cybercrimes leading to a prosecution, which compares poorly to the 17,900 cases of computer hacking reported in 2018.

These figures highlight the need for law firms to do everything they can to protect themselves, as there's little likelihood of cybercrime reducing any time soon. And unfortunately, it seems that the vast majority of businesses are still struggling to plan for data breaches or attacks of this nature.

The DCMS report also claims that only 56% of respondents had valid cyber certification in place and only 16% have implemented any formal procedures or cybersecurity incident management processes. Staff training was also poor, with only 37% of businesses actively training staff to spot a cyber threat – which is ironic, as staff are usually the focus for cyberattacks.

We recognise that clients typically believe it is the responsibility of the MSP to handle security of their information and data, despite the possibility of each user within the client business falling victim to a cyberattack.

This has forced MSPs to adopt a security-first

mindset, not only centred around solutions, but also on processes for what to do if an attack takes place and how to handle an associated recovery. When choosing a future partner, an MSP who understands and can confidently support your business around cybersecurity will be strongly differentiated.

2 App-first strategies

Security is the number one consideration, but the bills must be paid, and the day job has to get done. So, not only does your MSP have to support the security aspect, it's critical that they also have an app-first strategy for your business. Here are a few questions you should ask and ought to be able to feel confident about the answers.

- What are the mission-critical applications on which your organisation relies? Here is where IT needs to strike a balance between delivering high availability and ongoing security.
- Which business-critical applications are helping to improve the productivity of your lawyers? Legal services need to be able to operate at peak performance for business operations, but IT will also need to secure the sensitive data collected.
- What are the customer-facing applications that help you engage directly with your clients? These might require the flexibility to handle sharp spikes in usage without eating up costly resources.
- When working with clients around their digital journey, the conversation with the best service providers should focus on security, infrastructure, connectivity and cloud, as each one of these areas will be led by the app-first approach.

Any of the major components within the solution can affect the way applications operate, especially practice management systems, with a potential knock-on effect for the overall business.



What are the mission-critical applications on which your organisation relies? Here is where IT needs to strike a balance between delivering high availability and ongoing security



3 See what's over the horizon

There are several emergent technology trends forecast to impact the UK legal market, with artificial intelligence (AI) perhaps gaining the most attention and momentum currently. With massive investment in the technology from all major technology players, and the rise of productised AI, we are now seeing it become more and more accessible for law firms of every size.

AI is also being made cheaper, faster and far more accessible with the advent of cloud technology. The ability to utilise AI on a per use basis, rather than the traditional investment methods, only contributes to the technology's attractiveness. Its growing use will also undoubtedly have a significant impact on the UK legal sector.

The ability to exploit this technology will depend on the skillset and knowledge base within the MSP. The best will demonstrate a deep understanding and extensive partner network that will support your journey. Blockchain, virtual reality and augmented reality will also likely find favour in 2019 and beyond.

4 The finer point of cloud

As businesses seek to drive digital transformation, cloud is increasingly being used to create new platforms that enhance customer engagement. The application of multi-cloud environments is enjoying significant growth, with customers relying mainly on just one cloud, while using others more sporadically. This should see leading MSPs offering consumption-based pricing models.

One of the most important areas to consider is how MSPs' propositions are supporting cost optimisation. It's been estimated that cloud spend is 30% over where it should be, owing in many ways to the complexity and volumes of the environments. So, it's critical that an MSP understands governance, security and compliance, and has a level of expertise around your cloud optimisation requirements.

5 Outcomes are in demand

Outcomes with pre-defined standards are likely to be more in-demand, and MSPs need to develop a full-stack service, rather than single-tower services. So, MSPs will probably evolve their style of management and the functions they deliver, backed by an ability to offer consulting services, to help deliver measurable results.



It's been estimated that cloud spend is 30% over where it should be, owing in many ways to the complexity and volumes of the environments. So, it's critical that an MSP understands governance, security and compliance

THE MARK OF SERVICE REFINEMENT

The cloud marketplace has drastically changed everything. We've written extensively on this subject in recent months, but, in short, we believe that when drawing up a shortlist of MSPs their offering should amount to more than just a list of IT-related services - expertise with cloud and IT systems should be a given. The service offered by MSPs now must be focused around solutions, their delivery and their ongoing management. They should tailor to what you need - not what's easiest for them to deliver.

The best service providers will adopt new technologies, while investing in the people and associated infrastructure to support their clients' current and future requirements. The offering should include the deployment and management of cloud solutions, some solely public, some combining public and private clouds, and other deployments including on-premise - whatever works best for the law firm.

And, perhaps most importantly, the chosen MSPs must understand the legal sector and the unique challenges faced by firms like yours, with relatable experience deploying solutions and services in a law firm environment.

The MSPs should demonstrate experience working with law firms of all sizes, from single-office firms to larger, multi-site firms, including international locations. If they're going to help you on your journey of digital transformation, ask yourself: do they have the experience to consult on your future IT strategy and help advise your direction of travel? Make sure you partner with an MSP to which the answer is an emphatic 'yes'. **LPM**



ABOUT US

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

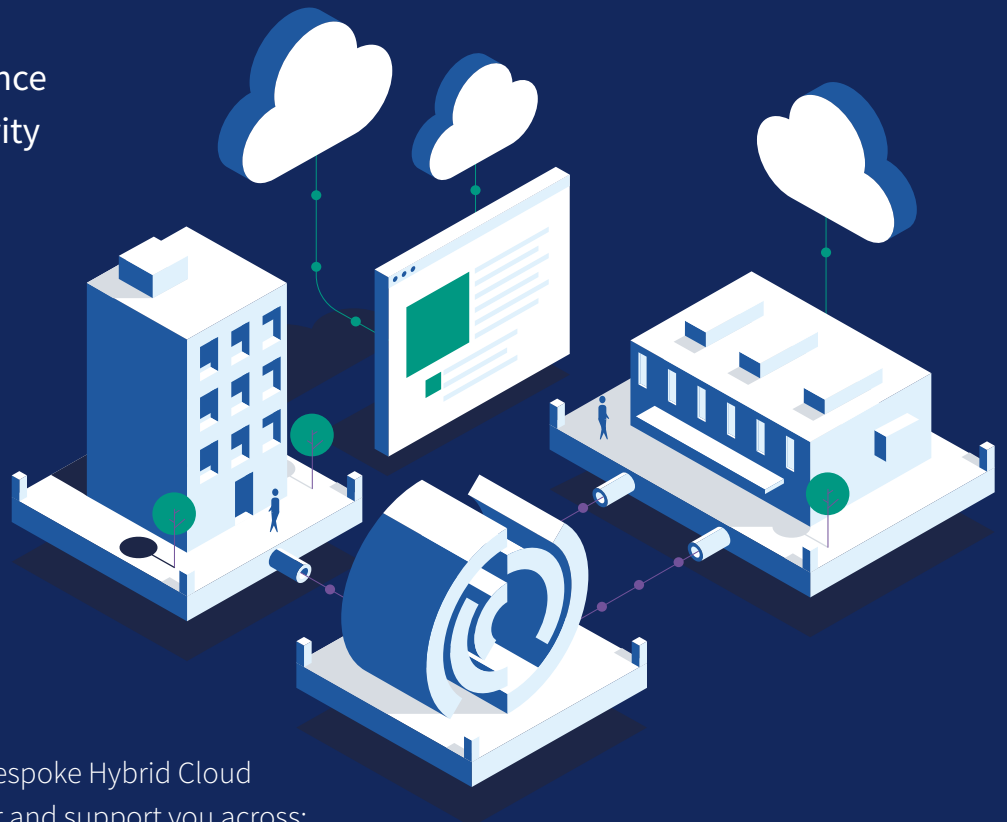


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INDUSTRY VIEWS INDEX

PLUG AWAY



38 CASE STUDY

Technically accessible
Mark Evans at **A&N Care Solicitors** on how **Accesspoint** supported his firm on a quest to find and implement a new case management system

40 CASE STUDY

Time for a change
Paul Lowe at **Wiggin Osborne Fullerlove** discusses the simple integration offered by **Timeslice's** practice management solution, Lawman

TECHNICALLY ACCESSIBLE



Mark Evans, practice manager at A&N Care Solicitors, on how Accesspoint helped the firm select and tailor its new case management system, and how the two are now mapping out the future

It's no great revelation that modern businesses, law firms included, need top-notch IT infrastructure to efficiently deliver the best service to clients and, in turn, promote growth. Family law specialist firm A&N Care solicitors is no exception and, if anything, the requirements of its work are even more demanding, as it deals with many sensitive cases.

FUNCTIONAL NEEDS

Having experienced fairly rapid growth in the preceding seven-year period, Mark Evans, practice manager at the firm, says that upgrading the case management system (CMS) was a necessity, but not easy.

"We're by no means IT experts; we needed someone to give us initial advice and consultation, in order to push forward without suffering undue disruption. For a firm of our size, it's a significant investment."

A&N had particular requirements, he says. "We need our workforce to be flexible so we can appear in court with less than a day's notice. We also have remote workers spread across Lincolnshire, Yorkshire and Derbyshire – we constantly need to be in touch with those people and they need to be able to access the CMS and our central documents really easily – whether that be from court or from home."

Formerly, Evans explains, A&N's IT supplier did everything, both providing the CMS and hosting it. So, when the firm went looking for a new provider, it wanted to find a partner that could offer hosted IT and had extensive experience in the legal sector. Enter Accesspoint. The company showed early on – with visits from the directors up to A&N's offices – that "they knew their stuff", as Evans puts it.



We're by no means IT experts; we needed someone to give us initial advice and consultation, in order to push forward without suffering undue disruption. For a firm of our size, it's a significant investment

LIVE AND LITIGATING

With consultation from Accesspoint, A&N chose Tikit's Partner 4 Windows (P4W). "Accesspoint had specific experience of that case management system, and an in-house team who could help us develop it," Evans says.

But Accesspoint also provided a hardware upgrade, which included replacing and upgrading infrastructure, servers and local switches, along with help implementing a leased line. The company would also be able to host the new system – but this required a significant data migration process.

Evans says it was an intense six months, from September 2018 up to the go-live day of 6 March 2019 – but Accesspoint had a handle on it throughout the entire process.

"We'd agreed to the schedule and date, but Accesspoint was doing all the work in the background, driving it – we relied on the team to have everything ready for us."

Accesspoint also installed a test database for training purposes, ahead of go-live day, he adds.

"It was a good practice run for us to get used to the system, but it also helped us to identify potential further developments."

The company provided user training in A&N's offices as well, and Evans explains the team was there to provide support on the big day, too. "We had two people from Accesspoint onsite who were floor-walking in the days before, during and after go-live to troubleshoot any issues."

Nevertheless, Evans says the firm has so far had no issues with the hosted environment provided by Accesspoint, although it had identified some challenges surrounding P4W. "That was our lack of understanding – partially it was different functionality in the old system. And that's part of the reason we're going through a development roadmap with Accesspoint."

PARTNER POWER

The relationship between the firm and the supplier is a close one, and it's been that way from the start, Evans says.

"It's been a very positive relationship – probably more like a partnership. Richard Roebuck, the managing director at Accesspoint, said we should treat Accesspoint like our in-house IT department – and that's pretty much what we do."

LPM FIRM FACTS

A&N Care Solicitors

Revenue: Undisclosed

Corporate status: Ltd

12 fee earners, 25 total staff

Offices: Sheffield, Rotherham, Barnsley, Doncaster, Chesterfield, Derby, Leeds, Wakefield, Boston, Grimsby



ABOUT US

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

www.theaccesspoint.co.uk



He says the day-to-day, front-end support from Accesspoint's help desk since go-live day has been "excellent", and that its support is comprehensive. "We call them for very minor stuff - if fee earners can't log on, for example - right through to development of the CMS."

But he explains that the firm also has access to other lines of communication for less routine issues or development tasks. "We've had direct access to Richard. He's been here several times in the last few months for one-to-one discussions around customisation and strategic support. But we also know we can just pick up the phone, or drop an email, and he'll get it done for us."

FORESEEN DEVELOPMENTS

A&N is already mapping out its future plans with Accesspoint, which will include a 12-month development roadmap.

"We're going to identify where we can automate parts of the case management process and where we can use the CMS to auto-populate documents, for example." But the firm will also look at improvements to its website, as well as social media strategy and possible use of AI around client engagement.

A&N hopes that the upgrade will help it to be more efficient and relieve the pressure on staff currently dealing with "clunky" processes. "We foresee that we'll be in a position to manage more work with the same size of team. We're obviously hoping to get the same or better feedback from clients, but we also want to see a positive impact on wellbeing and job satisfaction for our employees. The first few months have been positive, and we're excited about what's to come," and Evans says it doesn't look like that outlook is going to change any time soon. **LPM**

TIME FOR A CHANGE



Paul Lowe, partnership secretary at Wiggin Osborne Fullerlove, on how Timeslice's Lawman practice management system helps the firm better service its clients

Business change and technological transformation sometimes come about owing to an emergent business need, or the ever-present race with competition. Wiggin Osborne Fullerlove (WOF) found itself in need of a new practice management system (PMS) when its previous accounts practice solution was approaching end of life.

Before drawing up a shortlist, Paul Lowe, the firm's partnership secretary, knew that there were a number of critical boxes the new PMS would have to tick. Timeslice emerged as the most suitable provider that would allow the firm to fulfil all of its needs, namely servicing its clients, providing software functionality to work efficiently, creating reports to meet the partnership's expectations and managing its regulatory obligations.

FACE THE FACTORS

With WOF having used its prior system for 15 years, Lowe began searching for a dependable replacement. But its existing provider quickly ruled itself out. "Our previous vendor didn't have a suitable product for us. Although it does have a product that's relevant to our needs, it's much more for firms with hundreds of users. We have around 35 staff. They basically said to us: 'We don't have anything for you'."

The firm's business strategy and client profile meant that there were some baseline requirements any new solution would have to fulfil, and Lowe found that not every potential new provider could do that.

"We're a boutique international law firm, serving clients all over the UK and the world. Technology is pretty fundamental to delivering an excellent service to those clients - and we have a particular requirement to be able to record foreign currency transactions," he explains.

Timeslice's PMS, Lawman, eventually emerged from a pack of four or five contenders that would allow the firm to support all of its UK and

International clients. But what really made the provider stand out? Lowe explains that Timeslice seemed to actually understand what the firm really needed. "They weren't pushing any 'bells and whistles' that weren't relevant to us, whereas other suppliers did. Most of our work is bespoke - we don't have what I would call mainstream, 'high street requirements' - and we saw a lot of focus from other providers on automating tasks and use of technology to drive efficiencies. Lawman is relatively straightforward - it just does what it says on the tin."

He says that Wiggin Osborne Fullerlove also needed to move towards greater overall integration, and to replace its standalone document management system.

"We wanted a joined-up approach between the accounts and document management systems - they used to sit in their own dark corners. The previous accounts package had no integration with any other software, including Microsoft products. To integrate reports from the accounts package, for example, you had to print them and then save them into the document management system. That was about all we could do. It was pretty antiquated.

"The current accounts package now integrates easily with the standard Office products. So, you can create a report, export it into Excel, and then attach it to an email. You can save a report directly back into the document management system. There's a multitude of options, none of which were possible before."

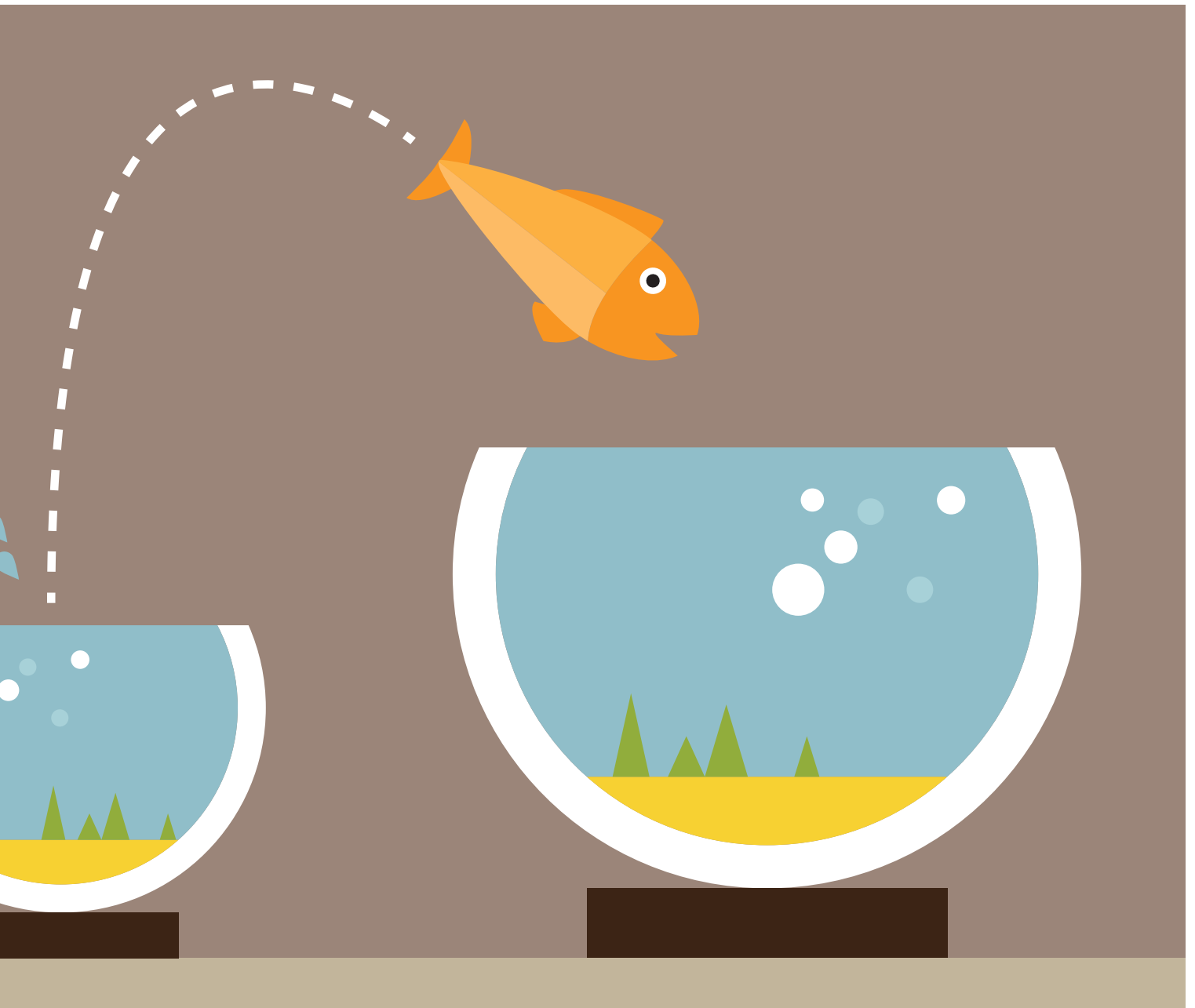
SMOOTH OPERATIONS

When it came time to transition over to the new solution, Lowe knew that replacing the firm's PMS would not be a walk in the park, but with Timeslice it was less painful than he might have thought.

"I've done migrations before - it can be two to four weeks, or even months, of considerable disruption. We didn't have that with Lawman. We

LPM FIRM FACTS

Wiggin Osborne Fullerlove
Revenue: Undisclosed
Corporate status: Partnership
16 fee earners, 35 total staff
Offices: Cheltenham, London



were working and billing from day one. This was the best migration experience I've been through."

Since the new PMS came online in July 2018, the firm has had continued contact with Timeslice over any issues, Lowe says. "People don't like change, but we've worked with Timeslice to implement some good ideas that mirror how our staff are used to working. We were able to replicate the things that we liked about working in our old system but with much better support on the technology side. Timeslice have been very accommodating in making minor alterations, where possible, to assist us."

He adds that the provider was able to offer an integrated package with full functionality out of the box, and no need to add other modules later. What it offered with Lawman was, as Lowe puts it, simplicity. He says that Timeslice's goals aligned with the firm's and that, in addition to providing a contemporary product and service, "they seemed to have 'good, old-fashioned values'."

The supplier seemed like a better fit for the needs of the firm the more Lowe did his research on the company. "The firms that Timeslice has

worked with recently include businesses that are similar to us in terms of size and practices. The due diligence I conducted backed my opinion and that of my team that it was the right supplier."

The supplier of Lawman is able to configure the PMS to be either hosted in the cloud or locally – and WOF chose to maintain continuity with its previous system by choosing the latter option. Lawman also offers the integration across systems that was previously lacking in even the most basic forms.

While Lawman can be adapted to suit the firm in question, Lowe says that Wiggin Osborne Fullerlove has so far had little need for extensive tailoring – but the door is open for potential changes in future. "There are things on our shopping list, and we'll have a discussion about them in the fullness of time."

For Wiggin Osborne Fullerlove, the inevitable end of one solution seems to have opened the door to a new, no-fuss system that brings its processes closer together, without the headache of endless customisations or bolt-ons – and in plenty of time, too. **LPM**

ABOUT US

Timeslice is a leading supplier of high quality software and related services to the legal profession. Timeslice's primary business interest is LAWMAN – a practice and case management system.

www.timeslice.co.uk





BOOK REVIEW

FOLLOW THE LAW

Florence Brocklesby, principal at Bellevue Law, on how Lynne's Laws of Leadership are reflected in her own founding and running of an SME law firm

In Lynne's Laws of Leadership, Lynne Burdon distils 30 years of experience creating and managing law firms into 20 'rules' for effective leadership. Her insightful book offers law firm leaders both inspiration and concrete practical tips.

Each chapter is brief and clearly written, and a busy managing partner might read the whole book in just a few hours, although it would serve equally well as a reference source for key decision-making over the years. Perhaps most importantly, however, is the author's evident passion for her work, clients and colleagues, which shines through in every chapter.

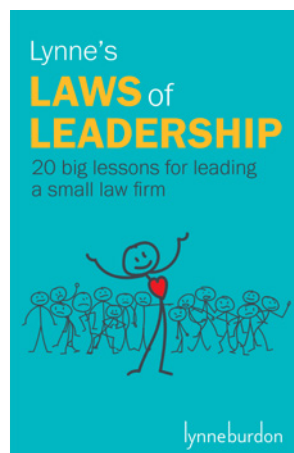
Burdon is generous in sharing her wealth of experience; her book covers the importance of knowing and communicating a firm's vision and values, the recruitment, development and (unfortunately) occasional dispatch of employees, the joys and stresses of partnership, key leadership skills, and even the importance of self-care.

The early chapters stress the importance to a firm of its core ideology, a detailed vision and unchanging key values. The author describes how in her firms, Bolt Burdon and later Bolt Burdon Kemp, emphasis was placed on providing clients with the highest standards of legal advice, service and ethics, while attracting the best lawyers by making the firm a great place to work. This resonates with my own firm's values, but other firms will have different, equally legitimate, missions. Leaders who don't know and communicate the purpose of their businesses, however, will struggle to manage them.

Reading the book as a more recent law firm founder, I recognised much of Burdon's description of her initial detailed vision for her firm, including the importance of a great office space and – especially – good coffee! Many founders and managing partners will also appreciate her recognition of the importance of knowing what motivates us and our teams to get up and come to work in the morning.

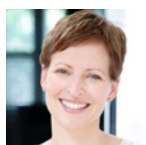
Several rules concern the difficulties of recruiting and retaining the right staff, with Burdon admitting that the one thing she would most wish to change from her 30 years in management would be to get recruitment right more often.

This is widely believed to be an increasing challenge as management teams grapple with the aspirations and



Lynne's Laws of Leadership: 20 big lessons for leading a small law firm by Lynne Burdon

Publisher: Practical Inspiration Publishing
Publication: September 2018
Price: £19.99



Reviewer: Florence Brocklesby, principal, Bellevue Law

expectations of millennial lawyers. Interestingly, Burdon argues that generational differences are often overstated.

She introduced an almost entirely flexible working policy for her whole workforce as early as 2003, so her perspective may reflect her own forward-looking approach; my own experience has certainly been that trusting our people with completely agile working has been the key to enabling us to recruit and retain great lawyers. More conservative law firm leaders may have a different experience.

Good partners are even more difficult to come by, and Burdon advises, wisely, that they should be chosen with more care than spouses!

The final chapters cover basic business principles: the importance of good decision-making, innovation, attention to detail and positive mental attitude. Many of Burdon's rules are so simple as to seem almost self-evident, yet it is surprising how often firms, both large and small, fail to implement them.

Although modern in her approach to working practices and technology, Burdon is refreshingly old-fashioned in her adherence to the profession's core values, and the importance she attaches to integrity, fairness, toughness where needed and emotional intelligence.

It is this aspect of Lynne's Laws of Leadership which is, in some ways, most inspirational and, together with its wealth of practical tips and fascinating anecdotes, an invaluable resource for any leader of a small – or indeed large law firm. **LPM**

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+44 (0) 330 025 0120
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