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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 or 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?

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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."

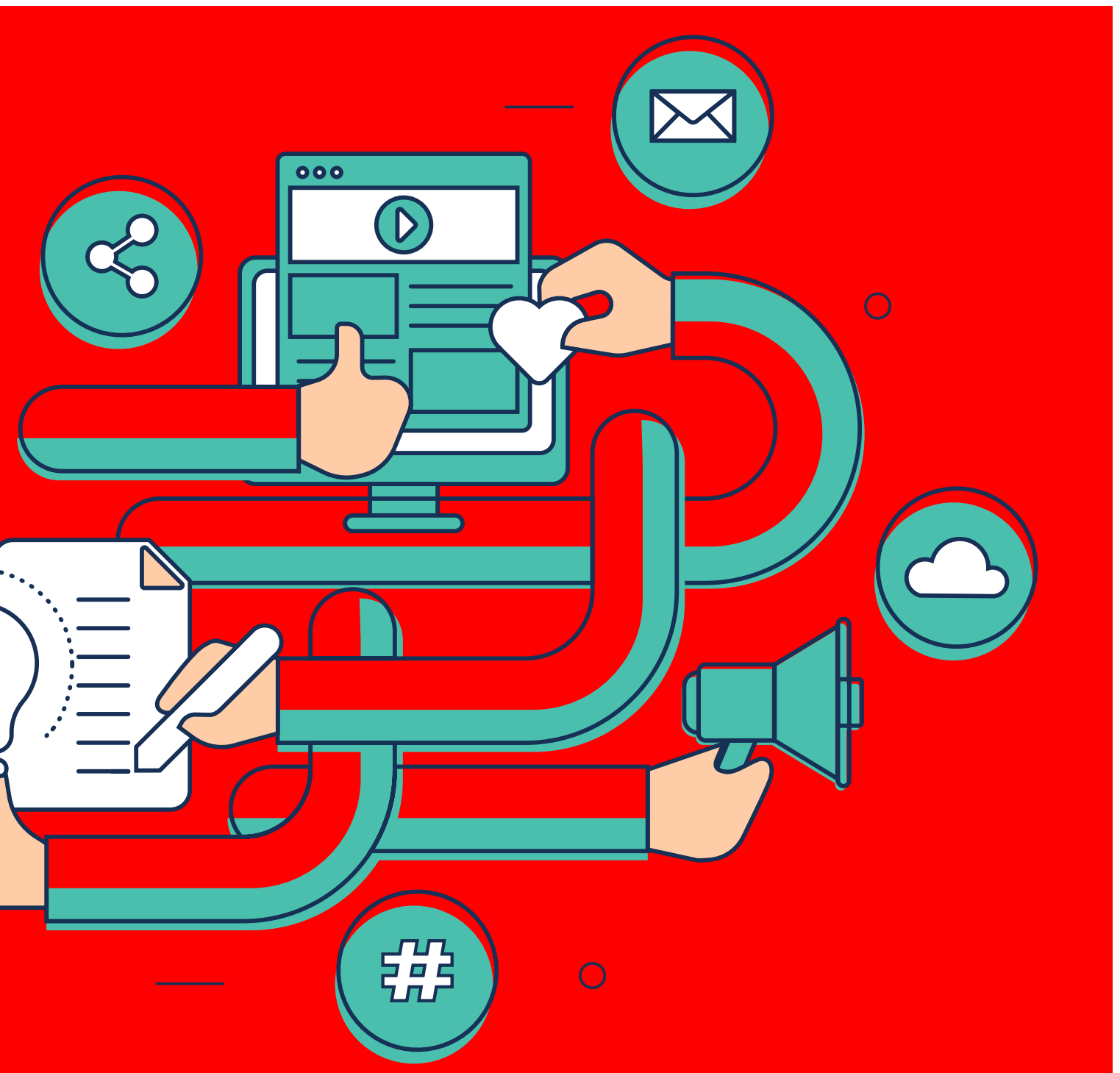
Everything that's linked and run through the platform is cloud-based, he adds. "Our lawyers should be able to access the platform from any device."

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

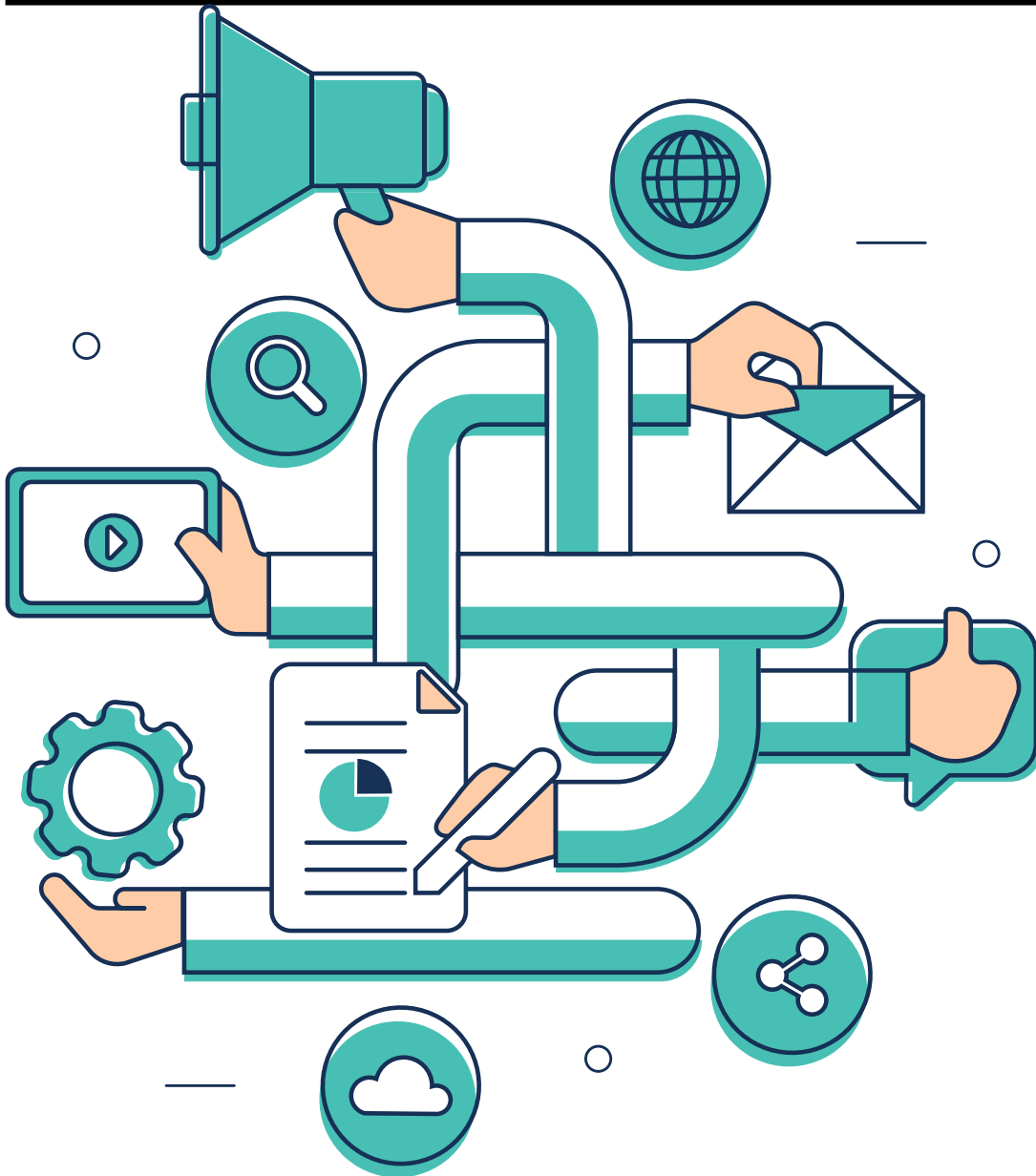
Carbon has very specific needs, says Burne, everything a lawyer should ever need to do – client onboarding, matter management, billing,

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

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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.

www.pulsant.com



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.

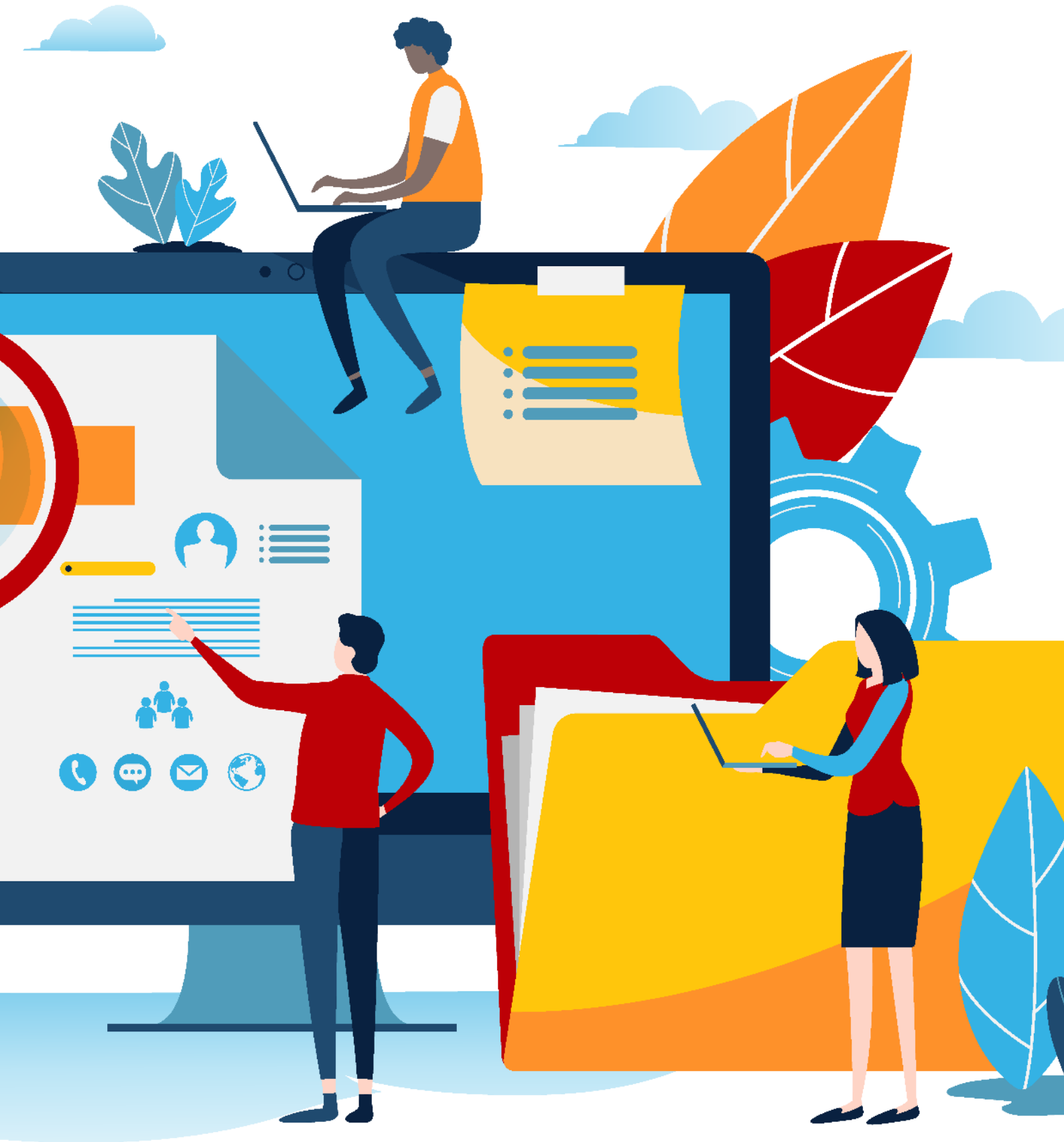
Although some firms will engage specialist consultants to help them select a managed IT service provider (MSP), the choice may be simpler if the provider not only addresses the firm's current IT concerns but also has the prescience to see likely market movements and challenges, while also behaving as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



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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.

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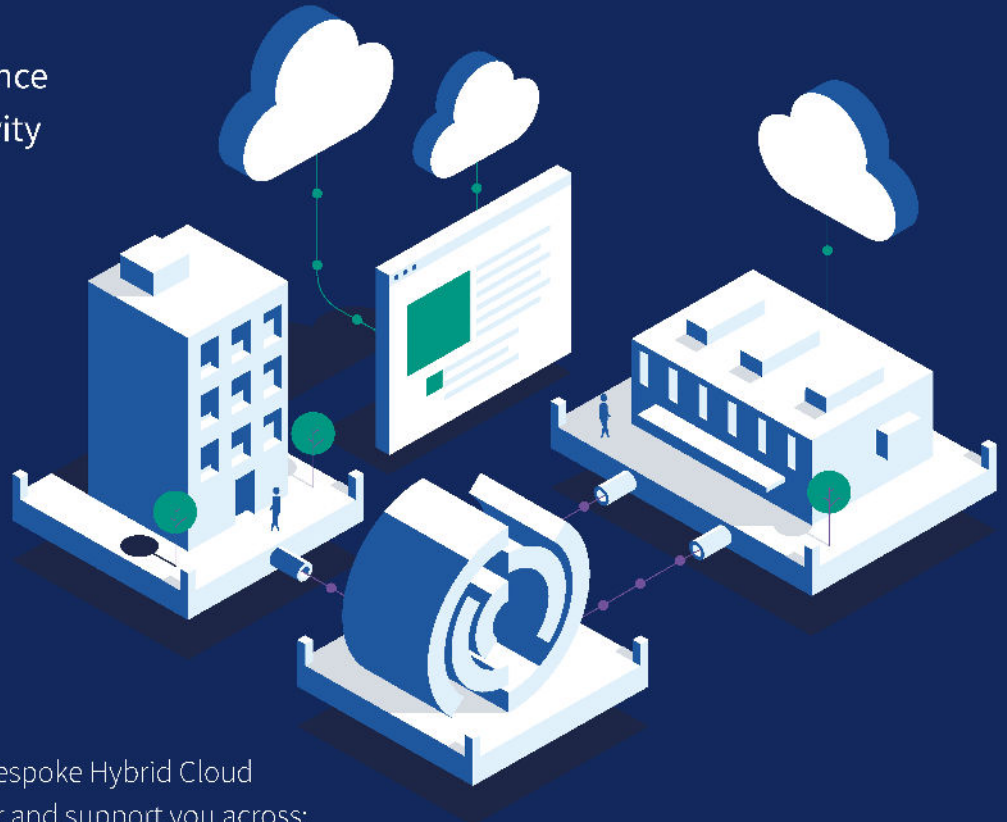
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