

OCTOBER 2019

LPM

LEGAL PRACTICE MANAGEMENT

THE ONLY
MAGAZINE
FOR LAW FIRM
MANAGERS

EXPERT
COLUMNISTS
AND ADVICE
FROM PRACTICE
MANAGEMENT

LPM ASKS

*Georgie Hall at Prettys
about the firm's mediation
solution Talking Works*

LPM EVENTS

*Tim Kidd at the ILFM
raises the curtain on the
LPM 2020 awards*



Process apping

*How SME law firms are preparing for future client
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Autumn has dropped and it's time to dust off those jumpers for pumpkin season. With a lot on the horizon, October may feel like the calm before the storm. But in the meantime, LPM checks in on law firm and client technologies. In this increasingly on-demand world of consumer behaviour, Jem Sandhu investigates what apps SME law firms are using for internal and external work and use of client portals (p18).

Following its recent announced merger with Gross & Co, Ellisons chief operating officer John Turner gives some key considerations when going through a merger (p7).

For part two of LPM's glimpse into law firm life in different cities, we stop in Manchester. Hear about how Manchester's history has influenced its law firms, interesting stories of Chinese investment and more on from p22.

And last, but certainly not least, it's that time again! No, not my musings about how much I love Halloween. We're happy to announce that entries for the **LPM Practice Excellence Awards 2020** will be opening in October. And we've added two new categories for our second year! Enter to be recognised for Client strategy and engagement, People and engagement, Service delivery efficiency or innovation, or Practice director/manager of the year. Find out more on p24 or go to www.lpmmag.co.uk/awards2020.

Kayli Olson, editor
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FACE THE BLAME

LPM's people guru Polly Jeanneret talks Love Island, social media slander and secret HR meeting recordings

Q I have noticed that you talk a lot about 'difficult' or 'temperamental' partners. But in my experience it's the clients that are the worst. We have one who treats our staff pretty shoddily: shouty, critical, unpleasant. Another told an associate recently that she belonged on Love Island!

A Belonging on Love Island: was that supposed to be an insult or a lewd insinuation? Either way, it crossed a boundary. I am heartily glad that you raise the problem of tricky clients. Partnerships can be reluctant to concede that the paying customer is often far from perfect. In a service business, what the client says goes. Lawyers and staff on the frontline with such people should be supported. There are skills you can teach about how to deal with shouty and critical clients. For example – don't take it personally. Also, the more they raise their voice, the more you should lower yours – I tried this with my kids when they were very small; it works! There is a limit to what staff should put up with, however, so listen when they say: "Enough of the Love Island lines, already."

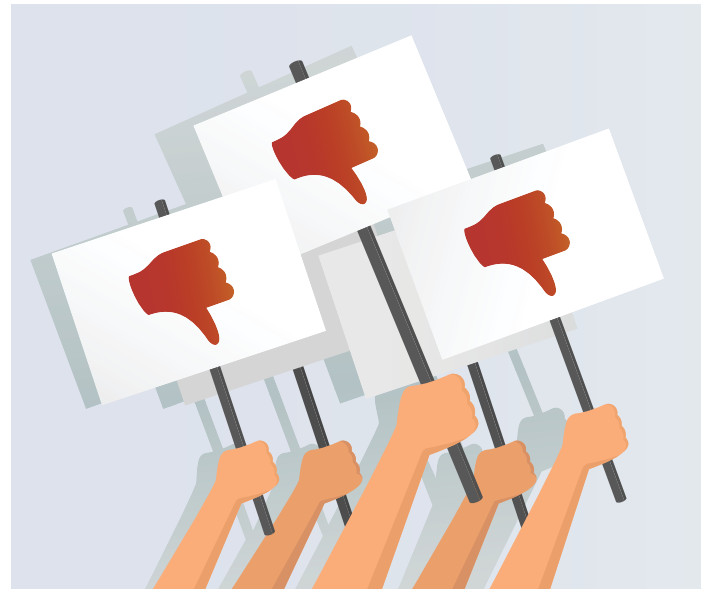
Q A junior lawyer posted a news story about immigration with the comment "Muslims should stay out of our Christian country" on his Facebook page. Unfortunately for us, a colleague of his complained about the post to HR. The firm is not mentioned on the lawyer's page, and the post was not made when he was in the office. What kind of response should we make?

A Isn't it time that social media is renamed 'anti-social media' since most of it appears to be full of hate and bile? You are right that the problem here is that you can't 'un-know' what you now know. You would be advised to take some sort of action: the firm will be judged on the steps that it takes to ensure that

such discriminatory material is not tolerated among colleagues. But what steps exactly? The junior lawyer's comments were not posted in a 'work situation', and the firm is not mentioned. It will be a disciplinary matter because the post has crossed over into the public sphere, and a cue for training. It's also an opportunity to remind staff of two truths. First, nothing on social media is really private. Second, in increasingly inflammatory times, the workplace should be a space where we can only, and always, be professional.

Q In an attempt to diffuse a situation, HR had a series of meetings with a senior member of our IT team who had raised issues of bullying in the team. After the meeting, it turned out that the individual had hidden their phone and used it to record the conversations with HR. What do we do now?

A We all know that covert recording is grounds for misconduct, so it's a potential disciplinary matter. However, the courts might show clemency if the recordings reveal something relevant, and if the actions were done in good faith. In a recent EAT case, where a claimant had made hidden recordings, the worst that happened was that her compensatory award was reduced by 10%. Any disciplinary process needs more information. Why did they think it necessary to covertly record meetings? What do the recordings reveal? And, out of interest, where on earth did they hide the phone so that it could make a decent recording and yet remain unseen? **LPM**



In a service business, what the client says goes. Lawyers and staff on the frontline with such people should be supported



TALK IT OVER

Georgie Hall, partner, mediator and collaborative lawyer at Prettys Solicitors, on how its innovative 'Talking Works' case resolution method results in happy clients and makes commercial sense

Q What's the Talking Works method?

A With Talking Works, we match the client to a solution method designed specifically for that client, having listened to what is important. Mediation, collaborative, kitchen table and roundtable work are used alongside traditional methods. Professionals such as financial advisers, accountants and family counsellors can also be involved at an early stage. The component package is based on the needs of the client. For example, roundtable is different from collaborative discussion: with collaborative, the rules are pre-set and specific, whereas with roundtable you design the rules to fit the need.

Q What are the benefits of the process?

A Traditionally, when a client comes in, solicitors have been taught to assess the legal position and offer a legal package. Talking Works allows us to be responsive to the individual's needs. Some clients have a good relationship with their partner and don't want solicitors to increase the formality or create communication issues. For

example, they would like to resolve problems themselves, but don't feel confident that they've taken everything into account. In these cases, I say, 'Let's talk through the issues and give you the legal framework so that we can work out what's sensible for you to be dealing with directly. One aspect may need legal intervention, so when you get to that point, we'll do that, but you can handle the rest yourself, touching base as you need.'

Q What was the main driver behind Talking Works? Wouldn't traditional mediation be enough?

A We introduced the method in 2009 and it was a responsive situation – driven by the market. The perspective of a lawyer being all-powerful was disappearing and people were asking, 'Why can't I resolve issues differently?' Sometimes mediation alone won't fit client needs – for example, there may be a confidence issue.

Q Can it be used with other types of legal work?

A Yes, and this is my passion! Prettys intend to roll out Talking Works across other areas, such as employment. You have an employee and an

employer – who wouldn't want a more constructive conclusion? Your conclusion will either be that you've converted the problem and retained the employee, or that the relationship wasn't a good fit. The more constructive the process, the less angry they will be. The process can also help with corporate cases. If, instead of escalating and litigating arguments between shareholders, we work with them in a discursive process, their business won't suffer as much damage.

Q Have you experienced any drawbacks to Talking Works?

A One point that you have to check is that the other person will react cooperatively. Before the first meeting, I get information from my client about the personalities involved, to be as informed as possible. You need a review process because things might not work out like you think they will. For example, if one person is not providing proper disclosure, you cannot properly consider financial division. If the situation is not resolvable, we cannot use a discursive process because it won't

achieve a fair outcome. Some solicitors might not like working in the Talking Works way because it puts them under pressure, so you have to think about the training you provide. Everybody in our team is trained as a mediator, and two of us are trained collaboratively.

Q It sounds like a real win for clients, but what about the impact on profitability?

A You have to have a fresh attitude toward fees. If you work in one way, you could earn £10,000 in fees. If you work in a way that's best for a particular client, you might only earn £4,000 but that client will tell others to come to you. The person charged £10,000 might think the result is expensive and that process has been applied to them as opposed to created for them. Charging more for one case doesn't necessarily make commercial sense. I finished a case for a client in 1997, and she recommends a client to me at least twice a year. When I've done training for other lawyers on this, I've explained that they need to think 'differently commercially', it's not about 'don't think commercially'. **LPM**

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A merger memo



JOHN TURNER, CHIEF OPERATING OFFICER, ELLISONS SOLICITORS



A plan to ensure early communication and regular engagement with people is imperative

Undergoing a merger or acquisition can present many opportunities, as Ellisons Solicitors, which recently announced its merger with Gross & Co, has discovered. The merger has extended Ellisons' reach into Suffolk and given the firm access to a London base. Despite the clear benefits, there are a number of considerations that need to be made. Here are five top tips:

1 ASSESSING THE RISKS

A lack of forward planning, particularly in relation to risk, can lead to undesirable circumstances. Even after a merger, risk management is a professional obligation and should be an ongoing process.

Early discussions around your target firm's approach to risk management, and its quality principles, confirmed by due diligence, will quickly indicate whether or not it's a match made in heaven. From there, control measures can be agreed, and while that may involve some difficult decisions, a clear plan should result in a successful outcome.

2 PEOPLE

A plan to ensure early communication and regular engagement with people is imperative. The prompt answering of all questions is paramount, to combat the big people risk-

uncertainty.

3 CONFLICTS AND CONFIDENTIALITY

A review of a selection of files of the target firm should always be conducted. This can give you an understanding of the current standard of work and highlight possible weaknesses. Conflicts and confidentiality are two major areas of professional conduct which also shouldn't be overlooked, so once that's done, your broker or the Solicitors Regulation Authority can advise you on future insurance.

4 INTEGRATION

Whether your firm is taking on a full-scale merger or a couple of new partners, it's crucial that the different components are fully integrated. The starting point is to have a detailed integration plan, which covers all aspects of operations, processes, people, technology, communication and risk management, as well as its structure and organisation.

5 COMMUNICATION

It's important that all team members are kept informed, especially regarding how the firm is to be restructured. It's also imperative that clients from both firms are informed of the merger or acquisition, and assured that the level of service, quality and client care will not falter. **LPM**

A FEELING OF DISCOMFORT?

A recent report carried out by the Trades Union Congress investigated the patchiness of management training in the UK. Findings show a disconnect between management and staff

1/3

feel uncomfortable approaching their managers about problems at work

45%

of workers believe their line manager doesn't help morale at work

35%

don't think their line manager treats them and their colleagues fairly

Source: Improving Line Management report 2019 TUC poll



Bespoke web forms can be created that allow you to add relevant data fields and attach the most suitable recipient to the field to receive the enquiry and respond accordingly

Get into formation

SCOTT BROWN, THE MEDIA MIND

The vision for the use of more joined-up IT within legal is now a major talking point across a good number of law firms and we're now starting to see how this can be implemented to best effect on the ground. Your website has the potential to be an untapped vault of yet-to-be-found wealth.

All too often law firms have committed themselves to big expenditures on technology, websites and marketing, which are often vastly underutilised or sometimes even misunderstood. These have the capability to deliver a lot more when managed and used correctly.

A firm's website no longer merely acts as a shop window but has the capability to pull in a more intelligent and efficient way of working by integrating software automation and linking it directly with a firm's practice management system (PMS).

As with everything related to IT, you must first consider and identify what outcome is required.

First, understand and adopt the power IT has to offer in accelerating your ability to overcome daily challenges, and then the importance of getting it right for your ever-changing environment and increasingly demanding colleagues and clients alike.

Web forms are a particularly data-rich environment as we know and could alleviate many hours, if not days, of admin resource.

Software is available that allows your firm to seamlessly join your website to your PMS. This can offer the ability to automatically inject the

data from your website enquiry forms and create a prospective client directly within your PMS – providing you with a seamless high-speed link between prospects, clients and solicitors, thus bridging the gap of miscommunication and wasted admin time.

With every enquiry form that's sent to your firm, you can track and analyse the data from it. The web form creates a prospective client and a follow-up automated action for the client intake process. The reports produced can track conversion rates from prospect to live client and how much revenue has been generated from your web forms.

Bespoke web forms can be created that allow you to add relevant data fields and attach the most suitable recipient to the field to receive the enquiry and respond accordingly.

Once the forms have been completed, an acknowledgement email can automatically be sent to the prospect within seconds, as well as a notification sent straight into the designated solicitor's inbox regarding the enquiry – the whole issue being dealt with in a matter of seconds.

A series of follow-up alerts can then be triggered to ensure that no enquiry will be missed. The whole process is tailored to your firm's internal procedures and General Data Protection Regulation requirements.

The future of utilising your website is bright. Software such as this shows that there are solutions out in the marketplace that can allow your firm to join the big league in making websites work for it and become more efficient in improving the firm's workflow. **LPM**

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Monthly file audits meant that the team could be proactive with regard to 'locationally challenged' files



Techo location

NATASHA RAWLEY, THE FILE QUEEN

So that's it, LPM readers – the summer holidays are over and everyone is back in the office. Welcome back everyone; we hope you have had a wonderful summer!

So, my first question this month is: “Where is your focus for the last quarter of 2019?” Yes, you heard me correctly: we're in the last few months of 2019. Hasn't it zoomed by?

Here at ADDS, we're in a flurry of productivity as more and more of our clients are preparing for the last quarter of 2019. There are potentially turbulent times ahead. As this column goes to print, Brexit looms and our parliament is in flux.

A direct result of these changes is that the ADDS team has seen a rise in the number of clients reviewing their processes around the three main management topics: time, money and people. We are helping them prepare to make their practices not only more efficient but more productive.

Our next columns will focus on some of our current projects, such as electronic discovery reference model (EDRM) and electronic mailrooms, to share our insights on how firms are cutting operational costs and improving their productivity.

In this column, we look at the recent increase in clients using our ActiveFile software. ActiveFile provides an app that our clients can use to manage onsite file rooms, as well as to sign files out to fee earners. The ADDS team first saw an increase in the use of this app when the

General Data Protection Regulation (GDPR) was introduced. The app is designed to constantly monitor the location of hardcopy files around the office, and also run full inventory audit checks with the barcode scanner attached to it.

Clients who used ActiveFile for GDPR compliance soon discovered that the consistent and easy monitoring of file locations saved the team a considerable amount of time, and also increased productivity. There were three reasons for this. First, files and deeds were being checked in and out of the onsite file room. This meant that time wasn't wasted looking for files that had already been removed. Second, personal assistants and secretaries were assigning files to fee earners. This meant that files needed by multiple fee earners could be located in record time. Third, monthly file audits meant that the team could be proactive with regard to 'locationally challenged' files, instead of finding issues once a fee earner had requested a file.

In addition to all these benefits, as all files and deeds were already registered and barcoded, the time needed to close and archive these files was reduced considerably. So, the archiving process on the file had already been started, and the audit trail maintained.

The majority of legal practices will retain an archive storage company and use its software. Talk to your supplier about the apps that they can offer you in order to improve your processes and productivity. **LPM**

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Profit needs to be converted into cash as quickly as possible for firms to flourish and have a competitive advantage in an increasingly uncertain marketplace



Looking at lockup

KATE ARNOTT, THE NUMBER CRUNCHER

Cash remains king in professional services firms, with poor cashflow being the largest contributor to the failure of law firms in recent times. Lockup therefore continues to be a hot topic, as the amount of cash tied up in either work-in-progress (WIP), or debtors, directly impacts the ability of partners to draw profits. It can also threaten the very existence of firms.

So why worry? Because lockup represents WIP not yet billed and debt not yet collected – effectively the amount of cash that could be available for use in the firm. This issue is exacerbated in law firms, as the majority of overheads are fixed and have to be paid, regardless of work completed.

Suppliers enforcing 30 to 45-day credit terms have to be balanced against 'potential cash', which may sit in WIP for 60 days and then take a further 60 days to be collected from clients. Any gap in working capital availability usually has to be bridged with further capital investment by partners and means limitations on partners' drawings: a double hit to individual partner finances.

Our national association, MHA, has been providing insight into the UK legal sector for the past seven years with an annual benchmarking report. Among other financial indicators, this report looks at lockup in over 100 regional law firms. The average lockup of those firms, ranging from the smallest (one-partner practices) to those with over 20 partners, stood at 120 days in 2018/19; equating to a rate of lockup varying from £67,000-£385,000 per equity partner. For the largest

firms, simply reducing lockup by one day could generate nearly £46,000.

It is imperative that firms continue to concentrate on reducing lockup significantly. Profit needs to be converted into cash as quickly as possible for firms to flourish and have a competitive advantage in an increasingly uncertain marketplace. Key considerations are:

- Fee earners, particularly partners, need to take responsibility for credit control procedures rather than leaving it to the finance team.
- Interim bill on matters. Bill immediately on completion rather than following traditional billing cycles.
- Avoid surprise bills. Debts are much harder to collect when they are under dispute.
- Enforce credit terms with customers. If appropriate, ask for money upfront before commencing work.
- Review performance targets and KPIs for fee earners. Consider the balance between a reward and a penalty system.
- Put sufficient monitoring systems in place so that accurate and timely data can be extracted to ensure that the lockup position is fully understood and addressed.
- Ensure that fee earners are fully trained and understand the importance of releasing lockup.

Our 2019 legal benchmarking report focuses on trends in income, profitability, employment costs and lockup. Contact us for a complimentary copy; and also to find out more about our 'understanding finance' workshops for lawyers. **LPM**



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When the choice is complicated, and the solutions presented to overcome a challenge are similar, it's easy to suffer decision inertia



Trust your instincts

NICK HAYNE, THE DATA MASTER

You are aware your IT environment is not all it should be, and it's holding back your business. So you call in the consultants or invite a number of managed IT service providers to pitch solutions that will resolve your problems.

You and your management team sit through all the presentations and hear what can be done. You understand how doing something – changing this or switching that – will make all the difference to your business.

But then, when you take time to consider everything, you find the solutions are all slightly different and the costs are similar. What do you do? How do you decide what is right for your business?

Doing nothing is not a viable option. When the choice is complicated, and the solutions presented to overcome a challenge are similar, it's easy to suffer decision inertia, regardless of the likelihood that the outcome will be less than optimal.

It's a big decision and not just in terms of cost. You will have to partner with this managed service provider for three to five years. So how do you decide when there is little difference between the solutions and you need to resolve the challenge facing your business?

You could delay the decision, but the problem with IT is that if you wait another year, the problem in your business will have compounded and you will have lost a year's benefits that could have been delivered by the new solution.

The steering committee or management team will influence your choice, but ultimately the decision rests with you. This is the point at which your instinct becomes important. Trust is

a significant factor; of all the people who can support your business into the next phase, who do you trust the most?

Still not sure? Fortunately, there is an equation that can help define trust:

$$\text{Trust} = \frac{\text{credibility} + \text{reliability} + \text{intimacy}}{\text{self-orientation}}$$

Credibility: Do they know their stuff? Do they understand the challenges you face? Are their references appropriate and high quality? Do they have experience working in the legal sector?

Reliability: Do they deliver on their promises? Have they been around long enough? Are they stable as a business? Is their team settled?

Intimacy: Do I like them as a business? Do I find their people approachable and engaging?

Self-orientation: This is possibly the most important consideration. Is the suggested solution addressing my interests or theirs? Is the solution right for my business, or is it just the easiest for them to deliver? Is their offering truly client-centric?

You can see from the equation that the less self-orientated the service provider, the higher they score for trust. Which is what you'd expect. If they care more about delivering the right solution than about what is easiest for them, there is a high likelihood that you can trust them.

Trusting a managed service provider you can get along with for the duration of the contract is one way to differentiate when the solutions are all similar. But whatever happens, do something. Doing what you have always done and expecting different results is not an option. **LPM**

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Don't think that, just because you're operating in a traditional working environment, you've missed your chance to adapt



Urgent app alert

DARREN GOWER, THE TECH GURU

If we're honest, the legal sector has never been particularly quick to adopt new technologies. Traditional ways of working have always served us well in the past, so why change anything?

Well, the answer is because we can always get better. There's always a new way to improve the level of service that law firms can offer their customers, and it's often done through technology.

Digital technologies in particular have a big impact on businesses because they're able to boost efficiencies. They can cut down time-consuming tasks into more manageable jobs, enabling more time to be spent on other areas of the business.

But it's not just about embracing technologies that allow your fee earners to be more productive. You can also put these solutions into the hands of your customer – creating not only a better experience for them, but also a more exciting one.

And the way to do that is through apps. Most people have a smartphone or a tablet and are used to using apps on a daily basis for a variety of things – from online banking and shopping, to browsing social media and reading the news.

The ability for them to communicate with

their legal team through a simple, easy-to-use app – available 24/7 – is a huge benefit. They can view information about their case any time, without having to pick up the phone or send an email and wait for a response.

Certain apps used by law firms provide real-time information, so users know that it's completely accurate and up to date.

This additional value will encourage people to pay for and retain your services. You have to ask yourself what you can do that other law firms can't. Using new technology is a great way of gaining an edge on your competitors.

Other firms are already providing these services – so you might be the one being left behind and losing that edge. The more quickly you implement apps and other process-improvement features, the more you will benefit.

But it's never too late. Don't think that, just because you're operating in a traditional working environment, you've missed your chance to adapt, and are behind everyone else.

Apps are going to be a bigger and bigger part of our lives in the coming years. Every day that goes by without you offering these powerful tools is another day that your competitors are gaining an edge. **LPM**

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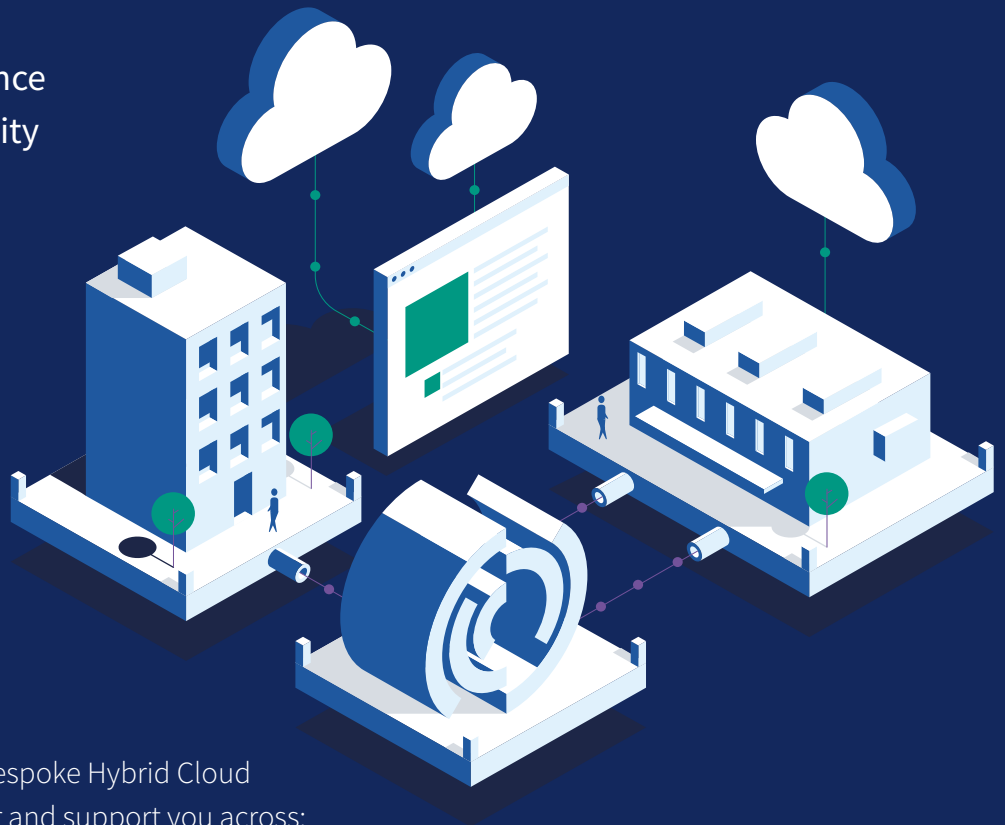
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Can providing apps for staff impact how you provide service to clients? Jem Sandhu reports on the use of client portals and apps at SME law firms

22 REGION FOCUS**Powerhouse players**

What does it mean to be an SME law firm in Manchester? Jem Sandhu talks to local firms about its history, workforce and future potential

Apt apps

Clients portals are on the rise, clients not only want on-demand services but on-demand attention to their existing matters. How are firms responding? Jem Sandhu reports

Clients increasingly want law firms to provide dedicated apps and portals – not only to keep track of their legal matters, but to provide business and legal services. In other words, Amazon-style delivery.

And law firms are taking notice. The competitiveness and efficiency benefits of client portals, for example, made them one of the top three technologies on law firm wishlists this year, according to our Legal IT landscapes 2019 report.

And it's not just about making the technology available for clients to use – the success of such on-demand services is enhanced by enabling staff to be as agile as possible when working. In other words, to create a seamless circle of connectivity. Sure, your brand-new client portal will automatically alert a client to an issue, but are you able to follow up with that client quickly if they want to talk to you about it? You can drop an audio file into the portal easily, but can you take the dictation itself while onsite with your client?

AGILITY WITHIN

Providing staff with apps they can access on their devices is one of the easiest routes to increased agility, and there are apps for pretty much all aspects of law firm practice.

Take dictation, for example. LPM's Legal IT landscapes 2019 report found that 68% of respondents think that digital dictation will be used fully in the cloud by 2023. Some firms are well on their way. Peter Carr, partner and head of IT at Fisher Jones Greenwood (FJG), has seen dictation app BigHand Go “revolutionise” how people work.

“You don't need to log on to a computer. People can submit dictations from anywhere. Our private client or commercial team can get these crucial notes out and into the transcription pools,” he says.

Eastbourne-based Stephen Rimmer Solicitors has also been using the dictation app for the

past year – realising clear efficiency gains. “Our crime team are often at court or the police station most of the day. So is our family law team. They don't need to come back into the office and do the dictation. They can just do it in between sessions,” says Grant Sanders, the firm's practice manager.

And, of course, there are the numerous apps that make it easier to connect and communicate. FJG not only makes use of Microsoft Teams, Skype and Yammer, it also provides tablets dedicated solely to FaceTiming or Skyping overseas clients. “This enables us to do ID checks that require a face-to-face interview,” says Carr.

The method – which enables speedier client onboarding – came recommended by the firm's compliance officer. “It works well and is fully compliant with anti-money laundering rules,” he says.

As director of quality and compliance at Ellisons, Gemma Garen is particularly concerned about the anti-money laundering (AML) rules. “In 2017, it took us forever to get the client to bring in their physical ID – there was a lot of toing and froing,” she says.

This all changed with the introduction of a dedicated app. “Now, all we need is their name, address and date of birth, and we run a check online. If we need to see their physical ID, the software providers check the scan of the ID so by the time it reaches us, we've had the assurance that it's been checked for validity.”

It's part of a major digital transformation at Ellisons, says Garen. Phase one of this transformation project was all about finalising internal configurations, which meant better portals for booking holiday and better systems to check anti-money laundering compliance. The firm used to spend so much time chasing things, she recalls.

“Fee earners were given Surface Pros and are very agile now – which is essential because we now have nine sites. We've recently acquired a firm and this portability of work has helped



enormously. So, if we have a lawyer in Chelmsford with a client in Ipswich, the new computer will connect to the Ipswich office easily and staff can continue with work," she says.

She sees this agility as critical for risk management and business continuity as well. She says supervisors can monitor work and allocate it as needed.

A MORE HOLISTIC SOLUTION

Even dedicated apps, mobile as they are, have a major limitation: they usually only enable users to do one thing – dictation, email or video calls, for example. You need many of them. Carr at FJG thinks that this is why people will move away from using apps. "As people use apps to engage with an increasing number of services – insurance, legal, health – they won't remember what's installed, and why," he says.

Perhaps there's another way. TWM Solicitors' remote computing setup enables full agility by default. The firm has seven sites across London and the south-east. "No one works on their local

computer beyond it being a thin client. If you're in Leatherhead for the day, you just find a desk and log in to the terminal server (a remote desktop such as Citrix), to get your working environment," says Alan Barrett, the firm's head of IT.

"We've used this solution for years and supplemented it with VPN technologies so people can work effectively from home. However, having quick mobility at courts or a client site was more of a challenge – with lack of power, data or speed connections all causing problems."

Barrett saw scope for more mobility, making this work environment available on any tablet,



In 2017, it took us forever to get the client to bring in their physical ID – there was a lot of toing and froing

Gemma Garen, director of quality and compliance, Ellisons



Everything must be scanned and up to date, so the app or portal can extract information from the CMS. Otherwise it means putting data into the CMS and re-keying it into the portal or the app

Grant Sanders, practice manager, Stephen Rimmer

securely. "I don't see the point of providing a tablet that only enables people to do certain things, when there is no holistic integration. Sometimes you want to check your email, but other times you need to be in the office even though you're out and about."

Appdome (an integration platform-as-a-service solution) allowed TWM to take this flexibility beyond the internal network and create a secure channel between a mobile device and the firm's terminal servers by using the Microsoft RDP (remote desktop protocol) client. And it then uses Appdome to "fuse" this application with Blackberry's security and mobility platform. TWM has used Blackberry for years, but this took its use of the platform to a new level, says Barrett.

"Now, we can cut through security protocols and have the entire working environment on a tablet without the hassle of setting up a VPN first," he says. He sees it as a paradigm shift – the managing partner was able to go on a motorbiking holiday and still be productive with just a tablet and a Bluetooth keyboard.

"He was travelling light, but still needed to stay in touch, and this was the perfect solution. So, instead of a bulky laptop and the need to find WiFi, boot up, log in to the VPN and then open a session to a terminal server, all he had to do was take out his 4G-enabled tablet and open a session in the 'fused' app while confirming his identity with two-factor authentication," says Barrett.

The firm had already felt confident enough security-wise to offer email, time recording and other apps to staff on phones via Blackberry, although Barrett doesn't see a tension between this and full RDP sessions available via the 'fused' client on tablets.

"If they want to quickly dip in and read emails with that app, or time record with another app while out and about, that's fine. But I knew this was going down well when the word spread and heads of departments were asking for me to allocate them to staff."

In August 2019, Stephen Rimmer took a similar route by installing a remote desktop server – though, owing to connectivity and security concerns, the firm kept it on-premise rather than in the cloud. "We're now in a place where people can start working from home. It fits nicely with our dictation app," says Sanders.

He sees remote working as important for both recruitment and client satisfaction. "We want to hire the best talent, and people don't want to be stuck at their desks from nine to five," he says.

It's an awful lot of connectivity. Carr at FJG acknowledges the "golden handcuff" nature of such technology. "Getting a work-life balance is more difficult now. We give guidance on good working habits and provide in-house wellbeing support," he says.

CLIENT FOCUS

If a firm isn't concerned about providing client apps or portals, they should be. Our 2019 Legal IT landscapes report found that online businesses and legal tech-based new businesses are seen as threats to law firms, especially to those that haven't recognised that clients' service requirements have changed.

And the one on-demand service that clients increasingly want is dedicated portals.

This is what Fisher Jones Greenwood found when it sent out questionnaires to clients at the conclusion of each matter, with a question asking whether an app or a client portal would help the client keep up to date with progress: 75% of respondents called it a "brilliant" idea.

As a result of the survey, the firm rolled out Perfect Portal, an app-based client portal, at the end of September. "Emails tend to get lost amid other emails. The app brings specific and relevant developments to the client's attention. And it doesn't overload clients with information," says Carr.

Perhaps most importantly, the app is secure enough to meet regulatory requirements. "It ticks the GDPR boxes and clears compliance hurdles," he says. It also helps cement the client relationship: "The client feels that we care about them."

Carr's firm also offers deal rooms through the Box platform. In addition to being secure and GDPR-compliant, it is, he feels, a unique selling point for the firm. "It encourages clients to come to us. Transactions are quicker since documents are available instantly, and the tool enables collaborative working. Redrafting can be done in real time between two or more parties."

Garen has had lots of queries about client portals – mainly from business clients – and they will form phase two of Ellisons' digital transformation, which the firm is currently moving into.

"We didn't want to ask clients to use it, but not be able to respond quickly from our end. We wanted to put our house in order first," she says.

The firm does have a "semi-external" portal, although Garen says it's not up to date yet. The focus is on corporate commercial clients. We share documents, collaborate and amend documents in real time."

Stephen Rimmer is also looking into installing a client portal, as it could assist with correspondence, signing documents and reducing

LPM FIRM FACTS

Stephen Rimmer

Revenue: £5.2m

Corporate status: LLP

40 fee earners, 89 total staff

Offices: Eastbourne, Hastings

LPM FIRM FACTS

TWM Solicitors

Revenue: £17.4m

Corporate status: LLP

90 partners, 235 total staff

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

LPM FIRM FACTS

Fisher Jones Greenwood**Revenue: £8m****Corporate status: LLP****75 fee earners, 160 total staff****Offices: Colchester, Chelmsford, Billericay, Clacton, Holland-on-Sea, London**

LPM FIRM FACTS

Ellisons**Revenue: £16.3m****Corporate status: Partnership****120 fee earners, 237 total staff****Offices: Colchester, Ipswich, Tendring, Chelmsford, Bury St Edmunds, London**

call inquiries. Whether or not clients use the portal could come down to practice area and demographics, Sanders thinks.

"The entry point for legal services for new consumers is usually conveyancing services for first-time buyers, whose average age is in the mid-thirties. They expect app-based products. Plus, conveyancing is process-heavy, and easy to milestone," he says. He also foresees that once clients use portals in one area, they will expect it for all their legal services.

TWM Solicitors is a traditional high-street firm, and Barrett is not seeing much of a demand yet for client portals. "We're starting to see people wanting to know what's going on with their matters, but we don't specifically ask them whether they want a portal because of the delay in delivering that securely."

However, the firm does offer some client services via its website. "Clients can submit a form that allows us to take large amounts of data, and we also offer virtual data room functionality," he says.

This is not to say that TWM has dismissed the idea of portals altogether. "We're working on providing a portal for specific niche suppliers, within particular elements of the business. And some of our corporates might benefit from portals so that they can keep track of their matters."

IT'S A WRAP

In addition to client portals, Sanders is also keen on client apps – seeing benefits for both general communication and keeping the firm present in the mind of someone who has a legal need. "Apps can send push notifications, such as 'have you read our newsletter?', 'have you thought about making a will?', or 'we have a discount this month'," he says.

However, given their arguably prohibitive cost (around £30,000 for a good app), Stephen Rimmer is also exploring 'wraps'. These are around 10% of the cost of an app, look exactly like apps on a mobile device screen, but which go to the mobile website. They also don't offer what is perhaps the most important element for clients – notifications. "With a wrap version, you have to proactively click on it rather than be prompted to look," says Sanders.

As with all technology, the journey to successful implementation of client portals and apps can be a bumpy one. There can also be unintended consequences. For example, a portal or app with notifications does make it seem that the firm is in regular contact – but this expectation of immediacy can have downsides. "If a client raised an issue two weeks ago and they see no movement, that could be a problem," Sanders points out.

And, as with most tools, you get what you put



in. Sanders recommends being as paperless as possible in advance. "Everything must be scanned and up to date, so the app or portal can extract information from the CMS. Otherwise it means putting data into the CMS and re-keying it into the portal or the app," he says.

Then there are the security concerns – which are heightened when it comes to client portals. Carr at FJG says: "Savvy clients, especially corporate ones, will insist on security being built into the terms and conditions of business. We make sure the client is happy with them before we proceed."

Barrett at TWM says: "We work the extra mile to produce a secure client portal. Law firms move a huge amount of money for clients, and attacks such as Friday afternoon fraud are an increasing concern. Everyone in the firm has a heightened suspicion of every transaction because we provide a lot of internal training and testing."

Similarly Garen at Ellisons sees security as the main issue with client portals. "If we're gathering data in a different way, in a different format, or in a different system, we always have to do a data protection impact assessment."

According to Sanders, Stephen Rimmer enforces a two-factor authentication policy for the remote desktop server. "This can help guard against any potential data breach happening and better protect the users' credentials and resources they can access."

One thing's for sure, the more clients become aware of portals, the more frustrated they will be at not being able to reach a fee earner for information that they know could be on such a portal. It's fair to say that the law firms we spoke with are ahead of the competition – LPM legal IT landscapes 2019 found that only 12% of law firms' IT budgets were spent on new things such as creating solutions, apps or client-facing systems. That's not a lot, but the signs are that an increasing number of firms are seeing the value in such ventures. **LPM**



Powerhouse players

Over recent years, Manchester has rapidly evolved into a global economic powerhouse. Jem Sandhu spoke with four very different Manchester firms to lift the lid on what's happening in the city

No single industry can be said to truly dominate in Manchester – a fact reflected in the diverse client base of the law firms we spoke to. It's a regional thing. "Manchester represents the diversity of the north-west quite strongly," says Adam Kerr, managing partner at Primas Law, a national commercial, corporate and property law firm whose rapid growth over the past few years meant a recent move to larger offices in Manchester – where it started three years ago.

Take CFG Law. Despite a unique specialisation in serious catastrophic injury, the firm finds more than enough work in the north-west, says CEO Richard Clark. CFG's five-year plan is to be the leading law firm of its kind in the UK – Manchester and the north-west provide a good platform to build from.

Centrefield, founded in 2015, is also a niche practice specialising in sports and media law. Edward Canty, a founding partner, is unable to name its very recognisable national and international clients, but office location definitely isn't an issue. "We act for most of the Premier League football clubs, as well as clubs, leagues and associations in other sports.

"People do ask whether being here is a hindrance, but we've been extremely successful based here and feel very loyal to the area."

Going national, or aspiring to it, is a common factor among Manchester law firms. So much so that Manchester-only commercial firms such as Kuits are a rarity, according to Steve Eccleston, the firm's managing partner. "For a long time, I thought we must be doing something wrong because everyone else seemed to be going national."

Kuits deals primarily with medium-sized enterprises based in the north-west – and marked its 110th anniversary this year.

MEDIA AND TECH RISING

One senior figure we spoke with has a personal connection to Spinningfields, the 430,000 sq ft commercial district where high-rise offices – housing the likes of Barclays – gleam over pedestrianised streets flanked by eateries such as the Refinery and the Ivy. She explains how the clientele lists of Manchester law firms have

developed alongside a century-long succession of industrial changes: the dominance of manufacturers replaced by that of warehousing clients, and then trading and investment businesses.

"In the early 1990s, I acted for one of the owners of the derelict warehouses on the site of what is now Spinningfields. He bought it as a towel warehouse, knocked the buildings down, and opened a car park for the growing workforce driving into the city. The council wanted to develop the land into a business hub, but plans had not evolved yet," she says.

It was only when Manchester was being redeveloped following the 1996 IRA bombing that the idea of a financial district took hold – though it would be 15 years before work began in earnest. Spinningfields ended up being the most visible symbol of Manchester's commercial ambitions.

The changes continue. Primas Law has increasingly been dealing with e-commerce and tech businesses, says Kerr, the result of a decade-long focus on transforming Manchester into a tech hub.

There's more media production – sparked by competition between Netflix and the traditional channels, according to Eccleston at Kuits. Various industrial villages dot the area – MediaCityUK being the most prominent.

Canty at Centrefield has seen an explosion in small, startup creatives over the last decade – though he points out that the city has always had that ethos. "There's a get-up-and-go spirit. It attracts those sorts of people and gives them the belief that they can start things and be successful," he says. He thinks this outlook will be fuelled further by a new development for creatives, tech industries and music companies. Its location? The old Granada Studio site – right next to Spinningfields.

INTENSE COMPETITION

Everyone wants a piece of this action. And the undeniable collegiality among Manchester firms perhaps belies how tough the competition can be. "It's definitely a grow or die environment," says Kerr at Primas Law.

Eccleston at Kuits also sometimes feels he is



LPM FIRM FACTS

Kuits

Revenue: £13m

Corporate status: LLP

108 fee earners, 188 total staff

Office: Manchester

LPM FIRM FACTS

Centrefield

Revenue: Undisclosed

Corporate status: LLP

11 fee earners, 13 total staff

Office: Manchester

LPM FIRM FACTS

CFG Law

Revenue: £5m

Corporate status: Ltd

47 fee earners, 70 total staff

Offices: Manchester City Centre, Cheadle

LPM FIRM FACTS

Primas Law

Revenue: £1.7m

Corporate status: Ltd

18 fee earners, 22 total staff

Offices: Manchester, Cheshire, London

competing for work with London firms. "They're starting to look at the bigger clients here as revenue sources," he observes.

Clark at CFG attributes this to Manchester's booming economy, with its abundance of corporate and commercial work. "A lot of tech companies that would have been startups in London are now here. There's an entrepreneurial outlook, a lot of tech work, and the big firms want a part of that."

But out-of-town firms should be aware of how intense the competition is – a fact connected to the sheer number of firms with fewer than 50 lawyers. "Five to 10 years ago, the legal services market fragmented, with lawyers coming out of firms and setting up," says Kerr. And with firms such as Primas Law disrupting the sector, Kerr sees the use of bigger firms for everything waning.

"Clients here don't care if a firm has 2,000 lawyers; they care about quality work, and service delivery in particular. Five or 10 years ago, a corporate client would have been nervous about not using a large regional firm. Now, clients are not afraid to move work to more entrepreneurial firms." He has even noticed larger firms quoting low on some jobs to retain a client or to get new work: "Three to five years ago they would have said, 'that's our cost, take it or leave it'."

Recruiting good lawyers can be competitive too. Having an office in the city centre can help. The quick commute (less than an hour from the north of the city) gives firms access to nine million people, according to Clark. All the new apartments have an impact.

"People in the age profile of 25–40 are increasingly living in the city," he says. And they don't need cars. Metrolink – recently named one of the best tram networks in the world by Eurogroup Consulting – is expanding; cycle paths are being built.

A COMMERCIAL MINDSET

Kerr says: "The commercial impact of the 'unique' Manchester style of service delivery cannot be underestimated. Clients here want to be spoken to straight. They are pragmatic in their approach to risk. Rather than a long-winded technical answer, they want to know whether they can proceed in a certain way. If the answer is 'no',

they want us to find a solution, quickly."

It can help to be a local firm. "The people delivering these services are Liverpool, Manchester, Leeds people, so they intuitively understand what the client wants," he adds. He sees this directness as the reason why a lot of work is coming up north (likely aided by a less than two-hour train journey from London).

OVERSEAS INVESTMENT

"There are lots and lots of cranes. A lot of that development is residential; much of it owned by far-east investors. It's changed the pace of life in Manchester and invited investment in other areas," adds Eccleston at Kuits.

No story about Manchester is complete without mentioning the influx of Chinese investment over the past five years. And not just in property. "The Chinese have invested heavily in the graphene developed by Manchester University, bringing in engineers and startups," says Clark at CFG.

The city's ongoing investment in infrastructure itself is a big enabler of this overseas investment. "The accessibility of China into Manchester – via Helsinki – is easier than people think. Investment in the airport is huge," he says. This interest is not fleeting (young Chinese people are enrolling in the universities), nor is it segregated from Manchester life.

Canty has seen lots of overseas investment into football, particularly at Premier League level. Some of Centrefield's clients have Chinese investors and the level of investment brings "good developments to those clubs".

But it's not just the overseas investment. Manchester has gone beyond its northern powerhouse image to become a global player. Centrefield acts for Major League Soccer, based in New York, and for many of its member clubs across North America. "For international clients, it doesn't make any difference whether the firm they instruct is in Manchester, London or Paris," says Canty.

The city's outlook is forward-thinking, and also resilient. Catastrophic events – the IRA and recent Manchester Arena bombings – tend to bring the city together, says Clark at CFG. "Manchester wants to be something; it's got ambition. It doesn't get knocked down easily. People are part of something that's doing exceptionally well." **LPM**

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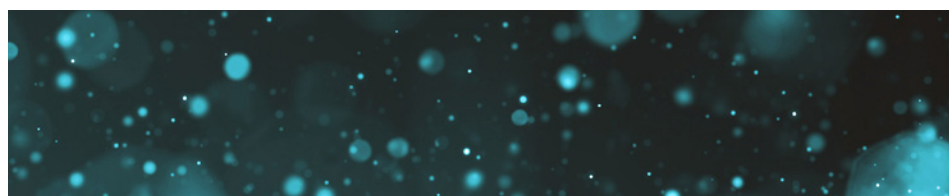
ILFM COLUMN

PRACTICE MADE PERFECT

As 2019 nears its finish line, the Institute of Legal Finance and Management (ILFM) is keeping close tabs on regulatory and legal activities in the pipeline. With the Solicitors Regulation Authority's new handbook right around the corner, SME firms need to be on top of potential changes to process and administration. A particular area of interest will be changes to the accounts rules – but good finance and management is fundamental for any successful SME law firm. Alongside courses around the new SRA rules, VAT, COFA and legal cashing training and others, the ILFM has introduced a course just for people like you, in legal practice management.

What are the lessons? Here are seven steps to better legal practice management:

- 1 Think strategy** – Don't just take things as they come. Have a plan, factor in things like budget and marketing activities, and stay on top of risk with SWOT/PESTEL.
- 2 Fluffy finance?** – Learn to gain insights from the economy, operating cycles, WIP and benchmarking.
- 3 It takes a leader** – Look within. Get to know your leadership style through different leadership theories and the importance of emotional intelligence. Learn to lead, motivate and inspire.
- 4 Management now** – Let's go back to basics. What does management



LPM PRACTICE EXCELLENCE AWARDS 2020

CLIENT STRATEGY AND ENGAGEMENT

Given for best process or campaign for maintaining and building on client engagement

PEOPLE AND ENGAGEMENT

Given for a people-focused initiative, change, programme or similar that demonstrates excellence in human capital innovation or employee engagement

SERVICE DELIVERY EFFICIENCY OR INNOVATION

Given for a programme/process/business change improving the firm's effectiveness and efficiency



Tim Kidd, chief executive at the Institute of Legal Finance and Management, talks supporting LPM Practice Excellence awards 2020 and gives top tips for legal practice managers

entail, what are the styles and theories? Use time management tools and other processes for better management success.

5 No eye in team – How well do you know your staff? Are you perceptive to their needs? Consider things like training and development, effective communication and change management as well as the art of delegation.

6 Employment matters – How do you handle complaints and grievances? What strategies work for recruitment, retention and succession?

7 More practice – The things that just need to be done, and done well: professional indemnity insurance, project and risk management and business process mapping.

The thing that ties it all together? It's culture, of course. There's always something to get excited about.

And there are some exciting things happening at the ILFM at the moment as well – not just the exciting new courses to stay on top of compliance, finance and management – chair Darren Whelan steps down from the role and into a new full-time position at the ILFM as director of education and development. Ian Johnson, director at Saffery Champness Chartered Accountants, steps in to take his place as ILFM chair in October. And the reason we're on this page? That's right – we're proud to be partnering with LPM again to help launch the LPM Practice Excellence Awards 2020. Watch this space. **LPM**

LEGAL PRACTICE MANAGER OF THE YEAR

Nominate yourself or a colleague for all-round outstanding performance in legal practice management

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SME UK law firm (no sole practitioners)
Revenue: <£20m
Deadline: Thursday 21 November 2019
Word count: -1000 words
Your entry must apply to project results achieved from January to November 2019

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PRACTICE EXCELLENCE AWARDS 2020



CLIENT STRATEGY AND ENGAGEMENT



PEOPLE AND ENGAGEMENT



SERVICE DELIVERY EFFICIENCY OR INNOVATION



LEGAL PRACTICE MANAGER OF THE YEAR

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NURTURING ENVIRONMENTS



James Temple, chief operating officer at Seddons, says partnering with CTS means improved staff performance, flexibility and cost savings

Seddons is an SME law firm based in London's west end. It advises UK and international clients on a range of specialisms including residential and commercial real estate, family law, corporate law and immigration, among others. The firm hopes to further build on its practice areas in the coming years, improving both its service delivery and profitability.

Like many other SME firms in recent years, Seddons aims to streamline its processes using technology. To achieve this, says Seddons' COO James Temple, the firm chose to – following an extensive selection process – partner with cloud and managed services provider CTS.

"What made CTS stand out above other vendors was its legal sector expertise. As our partnership continues to strengthen, CTS supports us with a detailed knowledge of our firm environment and application suite. CTS fully understands our business, and proactively monitors and supports our infrastructure."

A HEAD OF STRATEGY

Temple says quite a lot has changed over the years. "At the end of 2018, we created a three-year strategy that focuses on growth and improving efficiency, while driving down cost."

To support these goals, the firm appointed a new head of marketing and business development who helps drive new business and develops the firm's brand. For Temple, a particular focus is cost reduction.

But these aren't the only areas of interest for the firm's strategy. "Improving efficiency and streamlining processes are important goals for the firm. To achieve these goals, we plan to implement an agile environment for all our staff. People, technology and processes are at the heart of that, but of course, we also need to keep an eye on costs."

Prior to looking at an infrastructure revamp, Seddons was already benefiting from cloud-based services such as Office and Exchange 365, as well as backup and disaster-recovery solutions.

"Moving to an infrastructure-as-a-service model was an obvious choice for us because we were already comfortable with, and benefiting from, using cloud services.

"We knew we'd struggle to replicate the level of performance, scalability, security and reliability that we could get from a specialist managed service provider, without incurring significant costs."

CTS enables Seddons to reduce its capital expenditure and improve the performance, availability and flexibility of its technology capabilities, he says.

"Our new model removes the burden of managing infrastructure in-house. Historically, we had dedicated resources focused on keeping the lights on. Going down this route means that we can allocate those resources elsewhere, to more important tasks that add real value to the business."

CTS provides service from the base layer of infrastructure, up to operating level and patching, which leaves staff free to focus on the application layer, Temple explains.

"Therefore, our focus has moved away from maintaining infrastructure and towards driving change. Leveraging the service from CTS allows us to ingrain ourselves better in the business – spending more time analysing how people work and finding appropriate solutions to drive efficiency and improve our processes."



In addition to bringing previous experience delivering legal applications, CTS spent a lot of time with the firm to understand us as a business and where we're going

LPM FIRM FACTS

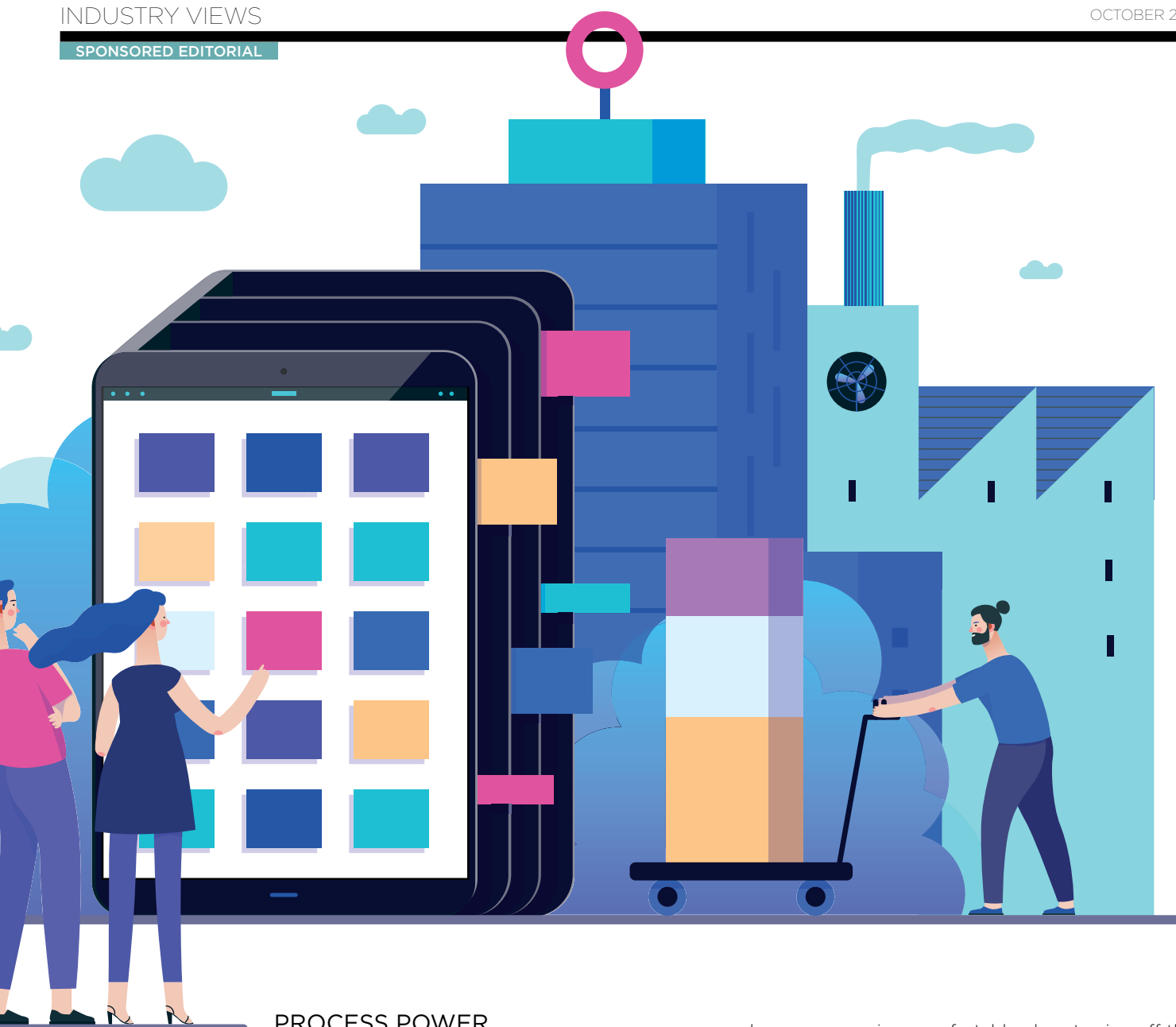
Seddons

Revenue: £14m

Corporate status: LLP

75 fee earners, 115 total staff

Office: London



PROCESS POWER

Temple says Seddons needed a solution that was flexible and scalable, which could expand with the firm's growth plans – CTS was that provider.

"Expanding the scope of services with CTS is at predefined rates, so there are no surprises. If the firm wanted to very quickly spin up a server, we know what it would cost. We can test it for a month, turn it off, and stop being charged for it," Temple says.

The key to delivering the firm's strategy around agile working is greater flexibility of technology and people, while ensuring that staff have access to its systems anytime, anywhere.

"As part of our migration to CTS, we moved to a new Citrix desktop, which is not only faster than the thick client it replaced, but also offers a consistent experience wherever you are in the world. This comes with less burden on the firm from a support and maintenance perspective."

The migration process itself was relatively simple and only took four months to complete, he says. "We had representatives from nearly every department testing the new desktop."

"We built a set of benchmark statistics taken from our old environment, which was mainly focused on functionality and performance. This provided a set of acceptance criteria on which to base our testing. Once the new environment met these criteria, we

knew we were in a comfortable place to sign off the live deployment."

Once greenlit, he says migrating itself was straightforward. The only component on which the staff needed to be trained was the slightly different process for logging on.

Seddons has seen a lot of positive feedback from staff since moving to CTS. Following the benchmarking for the project, the firm has seen both performance and productivity improve.

"The biggest factor in partnering with CTS was finding a provider that understood our technology stack. In addition to their extensive experience delivering legal applications, including our practice management system Eclipse Proclaim, CTS spent a lot of time with the firm to understand us as business and where we're going," he says.

Seddons wasn't just looking for somebody to build its infrastructure: it was looking for a partner for a long-term relationship. "We needed to make sure that we entered into a relationship with a company that we knew would evolve as technology advances and offer us a platform on which we can grow."

The firm is now server-free on-premises and wholly cloud-based for all IT services. Temple says that partnering with CTS has placed Seddons in an excellent position to implement its planned strategy over the next few years, and beyond. **LPM**

ABOUT US

CTS provides law firms with mission-critical managed cloud services, including IaaS, hosting, business continuity and security services.

www.cts.co.uk



FINANCIAL FREEDOM



Vin Chauhan, IT director at Brady Solicitors, on how Katchr revolutionised reporting for the firm – providing deeper and more frequent financial information with ease

Good data and financial information have always been an integral part of running a business, but in recent years the necessity to pull out business intelligence and management information quickly and drill down into data to gain insights has been on the rise, especially in the legal sector.

Established in 2008, Brady Solicitors continues to focus on being the leading law firm in the property management sector in the UK. It wants to grow consistently and have good financial performance.

One of the things about starting a new law firm, IT director Vin Chauhan says, is that you have a blank slate for brand and expectation.

Brady Solicitors is dedicated to being a client service-oriented firm and transparent in the way it works – which means being transparent to clients but also staff in terms of figures, what they're used for and how staff can help the business move forward.

"The biggest challenge has always been financial targets, performance management and managing growth. It's important we get that right and Katchr has helped us to manage that."

OUTGROWING EXPECTATIONS

For a while Chauhan was responsible for pulling data from the firm's systems to produce reports for fee earners and management.



Katchr ticked all the right boxes for us. Other products we looked at were complicated to set up, costly and lacked the out-of-the-box solutions that are preferred for a small law firm like ours

"The firm became reliant on IT and me providing all the reporting data and KPIs. In my view, it was becoming a risk to the business because we were spending far too much time on report production rather than on workflows and streamlining business processes, which in turn has an effect on efficiency and profitability."

But that wasn't all, he says. The firm also wanted more in-depth financial information, and the reporting tools that it used within its PMS just didn't give the firm the information it needed.

"Katchr ticked all the right boxes for us. Other products we looked at were complicated to set up, costly and lacked the out-of-the-box solutions that are preferred for a small law firm like ours."

Katchr provides the firm with the ability to see all the financial data on variances against targets at firm level, team level and individual fee earner level in real time.

Chauhan says: "What Katchr does is present these multiple levels of financial data in a simple and understandable format without always having to run reports. It's easy for staff to access, more transparent and they can drill down into things. It also means that our teams can self-manage."

"This has taken a huge burden away from me as IT director, and my team and I can focus on other important tasks such as creating efficiencies and other big IT projects."

He adds that variances against targets are particularly useful, and something the firm didn't always have in its KPIs before. "What it enables us to do is raise awareness of targets for the firm and be more open and transparent, and therefore change people's behaviour and culture to help our firm evolve and grow."

REFRESHING SERVICE

Chauhan says working with Katchr has also been a breath of fresh air in terms of client engagement and experience. "Katchr had a can-do attitude – there's no job that is too big or small."

This was especially true as Brady Solicitors was

LPM FIRM FACTS

Brady Solicitors

Revenue: undisclosed

Corporate status: Ltd

16 fee earners, 30 total staff

Offices: London, Nottingham



the first to experience Katchr's implementation with Eclipse Proclaim. "We were a bit nervous about the project because of that, but Katchr's data integration specialists were excellent and the project was a success.

"The Katchr team are fantastic to work with; they consistently deliver on what they say they're going to do. And in the legal industry, where customer service can be up and down, it's one of the best I've experienced," he says.

Before embarking on the project, Chauhan says the firm discussed what it wanted to focus on as a business and where it's headed.

"Katchr really got to know us and how we work and was able to focus on our business goals with us. They're open to what we want to do and happy to take them on board."

The system provides the flexibility for either Katchr or the firm to build dashboards and show information that's pertinent the business. Katchr is also available to train staff and provide additional support when needed, he adds.

"I've attended Katchr's user conferences, which I found absolutely amazing and very helpful. It's great to interact with other users. It gives me and my managing director an idea of what Katchr's roadmap is and what they're trying to do."

And as Brady Solicitors is looking at client profitability in a bit more detail, Chauhan explains, Katchr has helped the firm to pull the data it needs from its PMS – monthly accounting reporting procedures are now done with a click of a button.

"The platform has been able to take our reporting further – for example, manage our business not just on a monthly and yearly target basis, but quarterly as well. And it's a feature that wasn't in the system before – when we talked to them about it, they turned it around very quickly."

Little things like this make a load of difference to the firm, says Chauhan. Knowledge certainly is power, and for a growing dynamic law firm with a hungry desire for success, good reporting insights will be key. **LPM**

ABOUT US

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

www.katchr.com





CHOOSY CUSTOMERS

Adrian Jones, product and development director at Tikit, explains the dramatic changes taking place in how consumers select legal service providers

The recent Legal Services Consumer Panel report (carried out by YouGov) has found some dramatic shifts between 2011 and 2019 in how consumers go about choosing legal services. Most notably, younger people are much more likely (39%) to shop around than older consumers (25%).

What factors are they taking into account when shopping around, and what can law firms do to prepare for this increasingly customer-centric legal services market?

LAW FIRM LAG

When talking about changes in how people choose law firms, Adrian Jones, product and development director at Tikit, makes a comparison with more general consumer patterns of buying behaviour. He notes how, because of the plethora of information available on the internet, people are becoming more intelligent in their buying habits. "A

decade ago, if you wanted to retain a solicitor, or renew your car insurance, you reached for the Yellow Pages, picked an advert, and called them during office hours," he says. He notes, in particular, that people would generally speak with just one or two possible providers.

The advent of the digital world changed this long-standing pattern of behaviour. "Now, we can get multiple comparative quotes for many services, such as car insurance, extremely quickly – 24 hours a day, 365 days a year. There is also a great deal of transparency in both the service and the price," says Jones.

He compares this current state of affairs with that in legal services, which he thinks is not as advanced. "You rarely find a law firm open on a Saturday afternoon," he notes. "But you can buy house insurance at that time of the day, or a new-build house throughout the weekend. The law will inevitably have to evolve and catch up."



Consumers feel comfortable and trusting of firms when they have a transparent fixed pricing structure to follow

TRANSPARENCY OFFER

People also increasingly want transparency around prices. Again, Jones draws comparison with the certainty that people expect from their everyday consumer services. “When you buy a new car, you know what it will cost. Generally, when you need legal services for property work, or a will for example, there should be the same transparency. Commercial work is different, but there should certainly be transparency for consumer legal work. Garages will normally put their service charges matrix on the wall,” he points out.

This was certainly the thinking behind new Solicitors Regulation Authority guidelines that required firms to list prices for certain services on their websites. The Legal Services Consumer Panel report also found that people most commonly have to find out the price of a service by asking the provider directly – surprisingly (or perhaps not, given how law firms lag behind), only 7% of legal consumers found prices via the website.

“A firm’s website is one of the most important first points of contact for a client. It seems counterproductive not to have transparency over pricing and allow a detailed quote for most types of work. Pricing is obviously not the only factor, but transparency is expected. SRA rules already covered the need for transparency on the basis of charges, but don’t dictate the level of detail,” says Jones.

THE REPUTATION FACTOR

However, price is not the only, or even the most important, consideration. The report found that, for 79% of consumers, a firm’s reputation was the most important factor in choosing legal

services. Jones is not surprised. “People want certainty around pricing, but that’s not necessarily the driving factor. They still want to be in a safe pair of hands when they turn to a solicitor. They want to know how much it will cost, but they also want a quality service from a trustworthy organisation,” he points out.

But how can a potential client find out about a firm’s reputation? One avenue is for a firm to list itself with a neutral third party. “Firms are starting to use organisations such as Trustpilot; that’s part of the transition to internet legal services,” says Jones. It could also be a partial solution to another finding from the report – that 44% of consumers didn’t find it easy to compare different providers. “The availability of technology will always drive change and law firms need to embrace it,” he says.

STAY COMPETITIVE

Jones points out that costs are one of the most common causes of complaints by consumers of legal services.

“Most aspects of what we purchase in our daily lives is for a known cost, whether it be for a new car, or decorator services. Legal services will increasingly need to move to this way of working. Consumers feel comfortable and trusting of firms when they have a transparent fixed pricing structure to follow. There are obviously complexities in some types of work that make giving fixed fees difficult, but this shouldn’t be the norm,” he says.

Portals can be a key part of ongoing transparency between the law firm and its client – and the extent to which consumers demand transparency can depend on which legal service they are buying. “People want to know what’s going on with their conveyancing transaction at any point in time, day or night. For other, less time-critical or emotive, transactions like probate, I don’t think there’s the same need to be proactive yet,” he says.

“For firms looking to buy new software, it’s important that they think about the client experience. A client portal is part of that. However, although it’s often on their shopping list, the uptake at the moment is not very high,” he adds.

And we can’t forget that it can all come down to how a firm works internally. An effective practice and case management system can influence consumer decisions by making a firm more competitive and better engaged with the client.

“The use of a good modern practice management system, backed up by strong internal processes, will reduce the base costs of undertaking the work. It also reduces risks, reduces the management of risks, and give greater visibility of costs. This then makes it easier to remain competitive from a position of certainty,” says Jones. **LPM**

ABOUT US

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

www.tikit.com

tikit

SLICE OF THE ACTION

Paul Rickerby, IT manager at Cleaver Fulton Rankin, says Timeslice's comprehensive suite of practice management solutions helped the firm to realise efficiencies and increased agility for fee earners

When Belfast-based Cleaver Fulton Rankin implemented Timeslice's integrated practice management system four years ago for its 100 staff, the firm had been with its previous time-recording system for 30 years, in addition to using a SharePoint system for document management.

Timeslice now comprises the firm's entire records system. "We don't just use it for time recording," says Paul Rickerby, the firm's IT manager, "but also for document and matter management. We used it for the KPIs too – to measure fee-earner performance and to make sure that we're compliant in terms of anti-money laundering."

A GRADUAL APPROACH

Cleaver Fulton Rankin is a 126-year-old major commercial law firm with a wide offering – from litigation, employment, corporate, banking and property, through to environmental and private client. When it came to implementing Timeslice's full suite, the firm paced itself – starting with the core offerings and then adding the billing features. "We started off using the basics – document management, time recording, reporting – and then added advanced billing features in 2017, along with credit control and anti-money laundering features. So, we've evolved with it," he says.

In addition to greater efficiency and time-savings, benefits included a much more agile working environment. "With the mobile recording app, our people can be out at client meetings, record time on the matter, and post it – so the ledger is always up to date, and more accurate.

We're also looking at giving them mobile access to the documents on the matter. Right now, they can pull up queries on the ledger and so on via the mobile app, but we're trying to get fee earners out more – so more mobile working, more working from home," says Rickerby.

And the anti-money laundering features have proved invaluable. "We can easily ensure that all of our clients and matters follow the Law Society's strict rules around money laundering," he says.

DISCOVERING TIMESLICE

"We were looking for something that would handle our document management," says Rickerby, explaining the impetus for the move away from its old system. "Our previous system only did time recording and the accountancy side," he says.

The firm had just started researching in earnest, when they came across Timeslice. "One of the legal newsletters featured a story about how Timeslice had migrated someone away from the



With the mobile recording app, our people can be out at client meetings, record time on the matter, and post it – so the ledger is always up to date, and more accurate

LPM FIRM FACTS

Cleaver Fulton Rankin

Revenue: undisclosed

Corporate status: Ltd

60 fee earners, 100 total staff

Office: Belfast



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



Timeslice

same system we originally had," says Rickerby. He immediately got in touch to see some demos – and was impressed with what he saw. "The two key areas for us were the document management piece – which was good because it has the automated filing of emails, which saves so much time, and the KPI capability, which enabled fee earners to know where they were with their targets," he says.

"We did look at other systems, but Timeslice was so competent. The choice was made based upon the pre-sales and all that it had done for us. It sent me good referrals from other clients, and I went to London to a legal IT event and met up with Timeslice and we decided to go with it."

And one of the main reasons for the move was that, unlike its old system, Timeslice wasn't stagnant – it was always adding new features. "The old platform didn't have any of these features. Timeslice was a more supportable platform," he says.

FAST IMPLEMENTATION

Timeslice took on the task of migrating the firm from both its old time-recording platform and its old SharePoint system. "We turned off the old electronic time recording system on a Friday. On the Monday, we recorded on paper while we did user acceptance testing. Then we went live with the Timeslice platform on Tuesday," he says.

Rickerby provides the training to new staff on the functionality of the Timeslice software – and describes Timeslice's level of support as "fantastic."

"Timeslice is very easy to work with; the team's knowledge is second to none; and anything that we require, they're flexible," he says.

And as Cleaver Fulton Rankin move forward with Timeslice, it definitely sees itself using more of the suite's features. "This will include digital requisitions, integration with Bundledocs, and anything else the team can provide us," says Rickerby. **LPM**

A portrait of Kirsten Maslen, a woman with dark hair, wearing a dark blue textured sweater, looking directly at the camera with a slight smile. The background is blurred, showing an outdoor setting with a brick wall and some greenery.

SHAPE-SHIFTING LAWYERS

Kirsten Maslen, director of small law and academic at Thomson Reuters, on the new 'Delta model' and how firms and law schools are equipping lawyers for 21st-century practice

The last 10 years have seen a shift in how legal services are delivered as the market becomes more data-driven, transparent and fragmented, according to Kirsten Maslen, director of small law and academic at Thomson Reuters.

With the power on the 'buy' side, what skills and attributes must a lawyer have to keep clients happy? If clients are unhappy, it's often not about price. Maslen cites a survey conducted by Thomson Reuters a few years ago, where close to half of 100 general counsel surveyed had changed their legal advisers in the previous year. The main reason? "They felt that the law firms did not understand their business," she says.

SHAPE UP

So, what do clients want from lawyers? The dominant model used to be the 'I-shaped' lawyer, who had deep expertise in legal practice and legal skills. For this traditional lawyer, skills beyond legal were considered secondary and, from a client point of view, perhaps unnecessary.

Then, in 2014, legal solutions architect Amani Smathers introduced us to the 'T-shaped lawyer'. "The T-shaped lawyer has all the legal expertise of the I-shaped lawyer, in addition to competencies in technology and business, such

as process improvement, data analytics and project management," says Maslen.

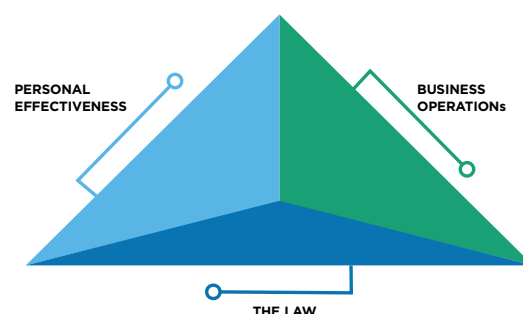
It's difficult to imagine a modern legal practice that doesn't, in some form or another, rely on legal tech. So, it's no surprise that the T-shape is the dominant model of the ideal lawyer in 2019, especially in larger firms. However, as Maslen points out, the market is moving towards strategic partnerships between lawyers and clients. They collaborate more with each other.

In other words, the T-shaped lawyer might just be obsolete.

THE DELTA MODEL

This is the thinking behind the 'Delta model' initiative from Thomson Reuters' Legal Executive Institute, which attempts to identify the key competencies for a successful 21st-century lawyer. The model was conceived in a design thinking workshop in 2018 hosted by Dan Linna, now at Northwestern Pritzker School of Law, and developed in collaboration with leaders in legal education and training. Following testing with hiring managers from law firms and corporates, the model was refined (see image: top right).

Personal effectiveness encompasses emotional intelligence (such as resilience, and taking responsibility for wellbeing), and relationship management (which 92% of the hiring managers cited as a top-10 competency). Most significantly, it includes an increasingly desirable quality among lawyers – an entrepreneurial mindset: agility, adaptability and keen problem-solving abilities. "It was cited by 91% of managers from law firms and corporates as the top attribute



within the personal effectiveness category," Maslen says.

The business and operations side of the triangle includes technology, and covers skills such as business fundamentals (which recruiters cited as the most important skill in this category), project management and workflow, and data analytics. "It's about understanding how the client makes money and how they operate – so, commercial awareness," she says. This set of competencies also covers tech skills.

But the requirement that lawyers know how to use technology isn't onerous. "When testing the Delta model, hiring managers didn't expect lawyers to have advanced technology skills, but felt they should be comfortable using an increasingly complex array of tools to deliver a service and know how to use different systems to add value to the client," she says. "For example, converting a Word document to create an automated version is a sought-after skill. But not every lawyer will need to know how to do this; it's enough that they can generate drafts."

The Delta model doesn't just apply to fee earners. "If you're working in practice management or in technology for a law firm, you still need some knowledge of the law, or at least of how the firm provides its legal services, to understand pain points and identify where tech can add value," says Maslen.

CREATING DIGITAL NATIVES

The next stage of the research will look at how recruiters can measure these competencies. "Thomson Reuters and the contributors to the Delta model hope to partner with law firm recruiters to develop case studies, and with law schools to develop metrics and curricula," she says. It's a timely initiative and a welcome one. Although hiring managers are always concerned about legal knowledge and analysis skills – "it's a given that they would be strong", says Maslen – what legal educators and trainers need to focus on in particular are the other sides of the triangle.

There can be an assumption that young lawyers today are already D-shaped – particularly on the tech side of business and operations. "Some people think because digital natives use smartphones and social media, they can also use business tech, but that's not the case. And just because they write essays in Word, that doesn't mean that they know how to format a contract in Word," says Maslen. In fact, it's not about age but more about openness to learning new skills and a recognition of the importance of these "non-legal" skills that will help them succeed, she says.

Happily, she has noticed a "massive shift" in thinking at the university level over the last three years when it comes to legal tech: "New modules and courses on legal technology have emerged, and some universities are running modules to bring law students and computer science students together to design solutions to address real-world legal problems."

At undergraduate level, these courses are the exception, and students themselves are keenly aware of the skills gap. Thomson Reuters' survey of over 100 law students last year found that "they felt their universities were meeting their needs in terms of legal expertise, but they lacked confidence on the tech front, particularly given what they were hearing about tech like AI and analytics," says Maslen.

However, in terms of personal effectiveness and client-service skills, "there has been an increase in legal clinical education in the US and UK, which provides client-facing practical education. Law firm recruiters value applicants with work experience in any kind of business, as it indicates the applicant will understand business dynamics and what is likely to matter to clients," she says.

While the Solicitors Qualifying Exam threatens the legal education market by not requiring aspiring lawyers to have a law degree or go to law school, it can also enable law schools to design programmes that meet the needs of firms and aspiring lawyers. The Legal Practice Course has elements which may not be relevant to the law firm sponsoring the student, she says. Though she points out that this assumes that sponsoring firms will continue to want law schools to provide these courses: "We will see more firms offering internal on-the-job training, and more apprentice-type arrangements."

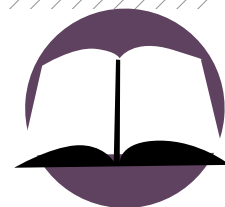
The gap can be wider when it comes to personal effectiveness. Maslen has spoken to a number of law firm recruiters over the last few years and the biggest deficit they see with law graduates centres on office skills. "Such as the ability to use basic Office applications, personal behaviour, and etiquette," she notes.

Delta model lawyers (or any shape of lawyer) aren't just born that way – they are created. The positive news is that legal educators and law firms – with their focus on entrepreneurship, recognition of emotional intelligence, and voicing of concerns about skill gaps – have all been busy fostering the qualities depicted in the Delta model for a few years now. The model, by pulling these competencies together, provides a framework for further discussion and benchmarking. **LPM**

ABOUT US

Thomson Reuters delivers best-of-class solutions to help legal professionals practise the law, manage their organisation and grow their business.

legal-solutions.co.uk



BOOK REVIEW

THE SWORD

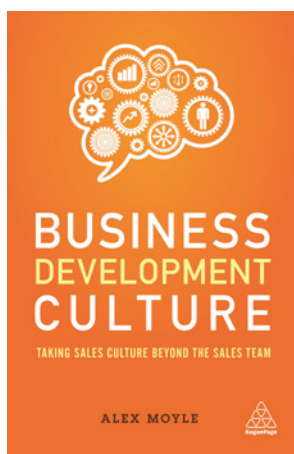
Shaun Jardine, commercial director and director of legal services at Brethertons, discusses free knowledge, sales and getting staff to go above and beyond

This is a book that will get lawyers' grey matter churning, but only those who have a business development mindset. I know that many lawyers might pick this book up and put it straight down, as they think that business development has nothing to do with them and, even worse, the book does mention the word 'selling'. Rather usefully, early on in the book (page five, to be precise), it identifies lawyers' traits by quoting phrases that the author hears regularly from lawyers: "I don't want to tell my client about our other services or they might think I'm being pushy" and "I don't do cold calls, I only call people I know" and "That's my client – I don't want anyone to call them". Rather optimistically, in the following paragraph, the author states: "This book will help you change those mindsets." I don't want to sound cynical, but Alex hasn't worked in the law as long as I have and it will take more than a book: possibly a book and a taser!

What I did like is that the book openly stated it is intended "to be a collection of techniques, strategies and approaches that you can use in your own organisation". The subject of the "value of knowledge" is taken head on. Many lawyers don't like to give their knowledge away – not an ounce of it – however, we all know that there is a load of knowledge available on the internet. How many of us actually look up NHS Direct when we're feeling ill? We try to self-diagnose our symptoms and will usually be completely wrong.

What's interesting is that the book identifies that many professional services firms are giving away guides, tip sheets and whitepapers for free. Increased knowledge has had a huge impact on the way that goods and services are purchased, and the book introduces us to something that Google calls the zero moment of truth (ZMOT). Essentially, the ZMOT is the premise that before you approach a company to buy goods or services, you'll most likely have established what they can do, read the reviews and seen what their competitors have to offer. The book identifies an interesting buying scenario where, if we were to look at purchasing sales training, we would probably do the following:

- 1 Email friends or colleagues and ask for recommendations.
- 2 Type 'sales training for solicitors' into Google. We can then read what the different providers do.
- 3 Post 'Can anyone recommend a good sales trainer for solicitors?' on LinkedIn. You will then get many suggestions.
- 4 Take those names, look up the reviews of the trainers or watch some videos of them presenting sales training on YouTube.



Business Development Culture: Taking Sales Culture Beyond the Sales Team by Alex Moyle

Publisher: Kogan Page
Published: September 2018
Price: £19.99
LPM reader offer: Use code HRLPMB to get 20% off at www.koganpage.com



Reviewer: Shaun Jardine, commercial director and director of legal services, Brethertons

I must confess that I had never heard the phrase ZMOT until I read this book, but I'm guilty of carrying out all four of the above stages when looking for people to supply Brethertons.

Another interesting chapter of the book, again early on, is about dealing with the concept of discretionary effort. The term discretionary effort implies that an employee has something extra to give over and above their day job if they choose to. This then leads to an important question: what does a manager or organisation have to do to encourage their employees to choose to do more than their job requires? The book goes on to deal with the challenges of cultural change.

Now, if you like what I have written so far, you may be interested to learn that these concepts all appear in the first 30 pages of the book, which is 227 pages long. Towards the end of the book, I think Alex Moyle thought that he must put in some theory, so there are quite a few graphs and Venn diagrams. These aren't really my thing. One of the best aspects of the book is that the various chapters identify discussion questions, which you can put to teams or individuals, and also identify exercises that you can carry out with members of your staff. So, all in all, as far as I'm concerned it is a good read.

If I met Alex Moyle in the pub and he asked me what I thought about his book, I would tell him that I thought he would make more money out of it if he went through the contents again and specifically targeted them at individual professional services. Therefore, he could make four or five books out of the research that he has put into one. It would be great if there were questions and exercises devised specifically for lawyers, accountants or insurance brokers, for example. So, if Alex Moyle ever does read this review, cut me in for 25%, because it was my idea! **LPM**



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