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LPM

LEGAL PRACTICE MANAGEMENT

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MAGAZINE
FOR LAW FIRM
MANAGERS

EXPERT
COLUMNISTS
AND ADVICE
FROM PRACTICE
MANAGEMENT

LAW FIRM PROFILE

*Hear about Simons
Muirhead & Burton's office
move and growth*

The End?

That's not all, folks

*Retirement is not necessarily the end credits to a law
firm's working relationship with its people - and careful
succession planning can ensure a sequel*

NEW COLUMNIST

*Alan Barrett, head of IT at
TWM Solicitors, tells tales
from his IT upbringing*

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About us



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



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



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



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



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

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

To say a lot has been happening recently would be an understatement. This month, LPM is shining the spotlight on SME law firm retirement and succession plans. It may feel like thinking about succession planning is the last thing on the priority list. But with the year coming to a close, possible Brexit on the horizon and regulation hot on your heels, it's more important than ever to be thinking about your staff's engagement and growth within the business – and by extension, the future of your business as a whole. Hear about what your colleagues are doing around succession planning on p16.

I recently visited Simons Muirhead & Burton's new offices in London to discuss the firm's move and its culture. Hear about their development and learnings from a client on p20.

Also this month, please give a warm welcome to new columnist Alan Barrett, head of IT at TWM Solicitors, as he introduces you to his world and personal history as an IT fanatic.

And, in case you missed it, if you flip this magazine issue upside down you'll see that we've bolted on a showcase of the LPM Practice Excellence Awards 2019 shortlist as our very first best practice manual! Have an initiative of your own to share? Enter the 2020 Awards by going to: www.lpmmag.co.uk/lpmawards2020

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



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Bridging the gaps in legal IT - efficiently



I grew up with technology and it became normal to think about how technology was going to help me or the businesses I've worked for



IT origins

ALAN BARRETT, HEAD OF IT

Welcome to my shiny new column. My name is Alan and I'm going to write regularly about all things loosely related to IT and how they fit into the legal business world. I've been head of IT at TWM Solicitors now for over 14 years, but I've been involved with technology since I was a very small boy and using tech has been a vocation and a passion for as long as I can remember. In fact my first 'computing' memory is of my father (that's right, I'm second generation IT) bringing back from work a very expensive Commodore Pet computer when I was seven and setting it up on a trestle table in the dining room (sorry, no open-plan living in 1977). He'd sit himself down in front of this glowing green screen and slowly work his way through the spiral-bound manual of instructions. And sometimes, before bed, I'd be allowed to type a few commands and watch the word 'hello' endlessly repeat on the screen or print on the dot matrix. Of course, I also let everyone at school know that 'we' had a computer at home and all the marvellous things it would do.

One spring day in 1982 at school, I received a tap on the shoulder from the headmaster, the imposing Mr Jones. I assumed I was in trouble (again), but he quickly calmed my guilty mind and enquired if it was true that I had a computer (it was a Sinclair ZX81) at home, and if so would I bring it in and demonstrate it to him? I readily agreed and spent the whole afternoon teaching him how to set it up and program Rings around Saturn on it. I also got to use his private toilet, which was just off his study, something no other student had ever done, nor probably any teacher! Not many 12-year-olds can say that they gave private lessons to (nor received them from) the headmaster.

Once I emerged from the headmaster's office, the die was cast and I became the leading computer expert among my fellow pupils. Roll forward 10 years and my first job was at the Institute of Education, London, working in the science department as the physics, electronics and computing technician. I ran the computing suite and got my first email address and went

online in 1993. As computing took off in the early 1990s, more academics at the university acquired computers. I started repairing my colleagues' computers as a sideline, thoroughly upsetting the official IT department in the process. This situation couldn't last for ever and I somehow managed to land a job running the IT at the London office of a management consultancy. I was to spend the first month in Paris at the HQ learning the systems, and before I left I told my father I'd email to let him know how things were going. However, when I asked my new colleague if I could use his email to send a quick note back home, he said: "Sorry we don't have email or the internet here." This was only 1995 and technology like this hadn't reached the professional world yet.

Again, I must have made an impression on people as I ended up fixing a lot of home computers and when one of the vice presidents left to join his father's software house as MD he invited me along as his IT manager. So in 1998, I moved to 5D Solutions, experts in pdf rip engines and visual special effects, and boy was this work cutting edge – a couple of the partners had created the first wholly CGI advert back in 1988 and our special effects were used on films like Titanic and Gladiator. Five years later I joined Reuters Venture Capital as IT manager with its Greenhouse fund of investments in technology startups and had the privilege of working alongside the original investor in Yahoo. From here the final hop was to TWM Solicitors, where I have taken the firm from an unreliable IT platform through office relocations, virtualisation, digitisation and cybersecurity to our current cloud adoption strategies.

I've been very lucky in my career. I grew up with technology and it became normal to think about how technology was going to help me or the businesses I've worked for. I don't think of technology as being something for its own sake – if you're going to use technology effectively, think of it as a tool. In future articles I'll explore what this philosophy actually means in practice and how IT is evolving again within the business world. See you next time. **LPM**

LPM FIRM FACTS

TWM Solicitors

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Forward-thinking technology allows people to combine the old with the new, using a sophisticated software gateway that transfers handwritten notes straight into the PMS, allowing a smooth transition into the modern world



Legal lagging?

GARY SHAW, THE LEGAL WIZ

The bridge between legal service requirements and IT has long been an important talking point but what can we really do to make things easier, faster and more informative? In some instances, the basic structure IT can take within a firm is limited, but it's not only the physical constraints on what can be achieved – it's also about changing people's mindsets. You need to have a clear eye and an understanding of your firm's future vision about using cost-effective IT solutions. Put simply: what's the return on your investment?

A prominent shift is happening across the legal sector as it progressively rises up and adopts new advances in technology. Gone are the days when a firm's website merely acted as a shop window. These days we all expect to get the most out of our websites in terms of leads, efficiencies and analytics, so that we are able to pinpoint where our money is going and what receives the most clicks, and also identify potential new clients.

More importantly, how can we best harvest the information generated by our web form enquiries in an automated way directly into the PMS? Clearly, firms that manage to achieve this have a much better chance of gaining that competitive edge and advantage through automated processing and cutting-edge customer relationship marketing. Needless to say, they can also tangibly measure what their ROI is now looking like, allowing them to make a much more accurate judgement on spending more of their hard-earned money in the right places.

Administrative time and associated costs for firms nowadays can prove to be make or break for profitability, particularly in the legal-aid sector. Process time across many client service areas are key, but now with automated form use, we can see dramatic changes in speed of process plus plentiful cost savings – it's now

easier to see how vital bridging the gap between legal service requirements and IT really is.

Rising pressure on costs is just one of the reasons law firms are forced to evaluate their methods and break down the dated barriers seen across a firm's admin work. Automated forms can also show a reduction in errors seen in work that until now has been manually entered, as well as save days of admin time and, in turn, money. Don't overlook this shortcut to an effective workflow; when it is done right, it can be one of the easiest transitions to moving with the times.

It's easy to see how, even when advanced IT is introduced to a firm, it can often be met with weary execution. As mentioned earlier, the problem is not only the physical constraints of implementing IT, it's also changing the mindset of the people within the firm. For instance, when a busy solicitor is on the move between meetings and court hearings and needs to constantly take notes, they will usually reach for a notepad and pen rather than a laptop, but will then have to waste time entering the data into the PMS system afterwards. The rapid change in technology shows high promise for catering to those who still prefer the traditional methods of handling important notes. Forward-thinking technology allows people to combine the old with the new, using a sophisticated software gateway that transfers handwritten notes straight into the PMS, allowing a smooth transition into the modern world.

We have seen major groundbreaking steps in implementing a more intelligent and efficient way of making IT work for us. With good vision, the correct tools and clever execution, using this software automation can transform how we work and importantly demonstrates how the gap between legal service requirements and IT is now being addressed to everyone's advantage. **LPM**

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It's essential firms strategically choose the few technologies they believe will have the greatest impact on their business

Chasing change

NICK HAYNE, THE DATA MASTER

Back in 2013, renowned marketer Scott Brinker described how he believed that the leading challenge faced by management teams was created by the concept that, while the pace of technological change is exponential, organisations only change logarithmically.

In simple terms, technology emerges and develops at a pace faster than organisations can keep up with. He dubbed this problem 'Martec's Law', believing it typically applied to marketing technology only. Accepting Moore's Law describes that technology changes at an exponential rate, Brinker opines that, as we know organisations do not change quickly, particularly larger, more established or traditional businesses like law firms, adopting and absorbing new technology is tough for them. It can feel like herding cats.

Every law firm knows it takes time and effort to establish changes in behaviour and culture. Only so many changes in people, processes, approach and technology can be productively integrated at any one time, all while the business operates smoothly for its clients.

The question for those guiding the future direction of their firms is: how do you manage a relatively slow-changing business in an environment of rapidly changing technology? It's not an easy question to answer.

And it's even tougher, given that we're promised new innovations on an almost weekly basis, as virtual, augmented and mixed reality, the internet of things, conversational interfaces, robotics, artificial intelligence and more become hot topics in every boardroom, everywhere.

It's easy to see how the next three years are likely to see more technological change than the previous three. The desire to close the gap and chase technological change can lead to rash decisions, shaped more by the perception

of the need than the reality.

Accept you will never catch up. The first step in managing Martec's Law is to understand that very few, if any, organisations will ever keep up with every technological advancement. Change now feels like it comes as a steadily climbing ramp, rather than in the distinct steps from the past.

The solution is all about the journey and how you manage that, rather than the ultimate destination. For management teams, the decision is which technology changes to adopt and which to ignore. You cannot chase them all and hope to exploit them all to their fullest potential. That way madness lies.

It's essential firms strategically choose the few technologies they believe will have the greatest impact on their business. And critically, let the others pass by. Chasing every new technology and trying to change too much will disrupt the business-as-usual activities and cause serious problems.

Following the decisions made by others can also be a problem and management teams must ruthlessly pursue only those changes that best align with their strategy and move them forwards on their journey of digital transformation. Firms can also attempt large leaps up the curve of technological change by adopting a whole raft of changes all at once.

This should really address the 'if we started today, what would our business look like' question, or might involve creating an internal startup without the legacy baggage – but be careful of the ensuing disruption. Finally, ensuring your firm becomes more agile and is more able to improve the rate at which it can recognise and adopt the technology that will deliver beneficial changes for the business will create the slight edge your business needs to outperform your competitors. **LPM**

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Digitalisation is no longer just about internal processes; clients' expectations are being driven by an ever-quickenening transactional environment, demanding that firms process contracts and matters at a higher rate



Digital succession

NATASHA RAWLEY, THE FILE QUEEN

Greetings, LPM readers. So that's it; winter is officially here and we find ourselves in the last quarter of 2019! How on earth did that happen?

As we edge towards 2020, we hear the scurrying of practice managers making project plans for next year and this magazine's cover topic of succession planning is very fitting.

Normally when we hear the term 'succession planning', we tend to focus on the drive for the identification, mentoring and support of new leaders for the firm in the coming years. But is a focus on the human aspect alone enough? Yes, we need strong, capable leaders with great foresight but what if the practice itself is not ready for the new leaders of tomorrow?

What if the internal processes within your practice are not focused on the future? What if dated processes and methods not only prevent the practice from moving into the future but also deter new leaders from joining your practice?

One of the major business innovations we see many practices struggle with is digital transformation. Digital transformation uses digital technologies to make your business processes more efficient – often giving practices a more agile culture with higher profitability levels and increased client satisfaction.

Digital transformation should not only focus on the case management process, but on your practice's sales, marketing, customer service and HR functions. Think about all of the processes within your practice and write them down. Could they benefit from digital transformation?

Moving processes into a digital solution not only makes your practice more dynamic but future-proofs your business. It gives your

practice the added benefits of flexibility, increased profits and a more agile position in the current business landscape, all while improving the client experience.

A classic example is the post. So often this function is overlooked but the post is one of the most important processes in your practice – it impacts cashflow, client satisfaction, matter file workflow as well as mainstream practice management functions. Run an exercise. How long does it take to sort the post everyday in your practice? How long does it take assistants and fee earners to deal with the post? What is the cost of time spent dealing with post to your practice? All this time your client is waiting!

Digitalisation is no longer just about internal processes; client's expectations are being driven by an ever-quickenening transactional environment, demanding that firms process contracts and matters at a higher rate. Yes, they want face-to-face care and great human experience, but they also want speed, accuracy and low maintenance. If you cannot provide these factors, how are you going to future-proof your firm? Will you be able to attract new talent with dated processes? What's stopping you from taking the digitalisation leap?

Many practices claim that digital solutions were accessed some time ago and they were extremely costly and not adequate enough. It's time to review these solutions again. Many suppliers have now had the time to develop their solutions into SME-tailored and affordable offerings, presenting a pick-and-mix style to the client.

So, go forth into the digital transformation arena and watch your practice blossom. **LPM**

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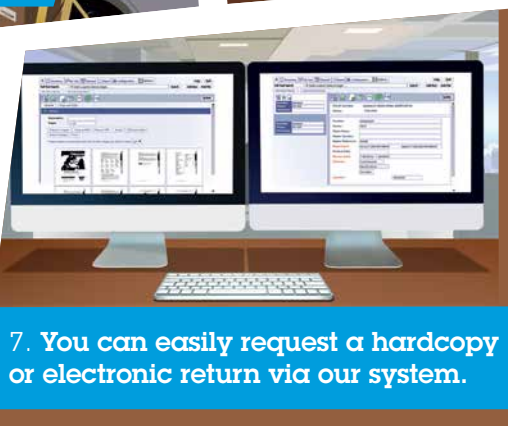


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A business continuity plan could include elements like remote working but should also include provision for a physical place where your staff can continue to work together



Amid disaster

ANDY BEVAN, THE CLOUD EXPERT

In today's digital age, business continuity is becoming increasingly important – especially when organisations are dealing with critical information, have deadlines to meet and work to do on behalf of clients. Law firms are a perfect example of this. Fee earners, partners, clerks and support staff need access to case and practice management systems, as well as billing and time-keeping applications. This is true regardless of where they are – whether that's at the office, working from a client site or at the court.

While remote working solutions and the advent of cloud has largely addressed the needs of the legal industry in this regard, there is a bigger challenge. In the event of a cyberattack, power outage or network disruption – or any situation where your offices or systems are inaccessible – there needs to be a business continuity plan in place to mitigate the risk. You need peace of mind that you can continue operating in the face of a disaster and you need to give those assurances to your clients too. If your fee earners don't have access to the systems and documents they need, they can't actually earn their fees. In the same vein, if they can't prepare the required paperwork on time for a case or file, this impacts your clients and the service they deliver.

A business continuity plan could include elements like remote working but should also include provision for a physical place where your staff can continue to work together. A workplace recovery site would replicate the office experience – giving your staff desks, phones, computers, access to the systems needed and, perhaps most important, meeting room space to continue to see clients.

So, what elements should you consider when choosing a workplace recovery service? First, and most important, is location. The site needs to be close enough to your office to ensure that it's easily and quickly accessible to your staff – but not too close, of course, in case it suffers from the same issue. In addition, the service provider must be able to cater for your requirements, especially around access to communications – voice and data, core systems and maintaining security.

Service level agreements are also really important to consider. Do you need 20 seats available in two hours? What about availability for five days, or longer? Work with your provider to finesse your requirements and make sure the service meets your needs.

You should also consider scalability – while you may not need seats for all your staff immediately, can your provider offer additional space if the outage is extended?

Finally, don't forget risk mitigation. You should work with the provider to ensure the service is fit for your purpose. This means testing the service at least twice a year to identify areas for improvement or potential issues. This also gives your staff an idea of the process to follow and what to expect in a real situation.

Ensuring your firm can continue operating in the face of disruption is critical. While remote working is certainly an element of business continuity planning, a workplace recovery service can give you and your clients added assurance and peace of mind. The best place to start is finding a provider in the right location, who meets your bespoke requirements and works with you to continually test and improve the service. **LPM**

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Law firms typically have fewer systems and resources in place with which to address money laundering, making them something of a 'soft target' for criminals



Tech your risk profile

ALEX WILLIAMS, THE TECHNOLOGIST

As you're probably aware, the EU's fifth anti-money laundering directive (5AMLD) comes into force in January 2020. And law firms really do need to comply, especially as they're particularly vulnerable. While banks and accountancy firms are much more geared up for this, law firms typically have fewer systems and resources in place with which to address money laundering, making them something of a 'soft target' for criminals. At the same time, failure to demonstrate that compliance processes are in place can have dire consequences: firms risk the ultimate sanction of being struck off. The question therefore becomes: how can firms comply in ways that are both compliant and cost effective? The answer is by utilising technology.

What does compliance look like? To assist with compliance with 5AMLD, technology can help by allowing you to verify the identity of new clients. There are two components to this. First, firms must verify that they're looking at a legitimate document, generally a passport or driving licence. This is easy enough if it's a UK driving licence, but what, for instance, does a Lithuanian one look like? Next, firms need to have verified that an individual is indeed who they claim to be, that they live where they say they do, and that their given date of birth is true.

Firms also need to check that a person isn't on a PEP (Politically Exposed Persons) list – that is, entrusted with a prominent public function, for example an MP or senior

government official, their immediate family and close associates. All of these people are deemed to be potentially vulnerable to bribery, embezzlement or other forms of corruption and are therefore subject to a higher standard of verification.

So, how can technology step in? It can be brought in to deal with all of the above, such as Tikit's P4W, which integrates with third-party verification providers. All the firm has to do is enter an individual's details into the system. They will then be checked for compliance and the result sent back to the firm. Without this type of technology, the time and effort taken to comply with 5AMLD using paper-based systems will be an onerous tax on firm efficiency.

Better yet, in around six months' time, P4W will have the capacity to push the process out to the client. This means that instead of a firm scanning documents and entering data, a link can be given to the prospective client. They then enter their own details, with the firm sent the result.

This will still be compliant with 5AMLD but it lifts an administrative burden off the firm, saving time and cost. It also greatly reduces the scope for typographical errors, strips out duplication of data entry (entering data first to verify, then to onboard) and – an important point – as such makes GDPR compliance easier for the firm. The less extraneous personal data there is in your system, the less you have to worry about. In terms of 5AMLD compliance, technology really is the way forward. **LPM**

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FEATURES INDEX

SHOOTING AHEAD

16 FEATURE**From hire to retire**

Staff retirement involves more than just a farewell party. Kayli Olson investigates how firms are approaching succession planning

20 LAW FIRM PROFILE**Media masters**

Kayli Olson talks to **Simons Muirhead & Burton** about its growth, and how it is exploring new ways of working

From hire to retire

Managing your staff's career paths can be a bit of a dance. And what happens when the day comes for one of them to retire? SME law firms need to be thinking about succession. Kayli Olson reports

With people living longer, more healthy lives, talking about retirement can seem a bit daunting – the way people think about and approach retirement is evolving. It doesn't necessarily mean that you'll stop work altogether. And employers need to be prepared to work with their employees on different arrangements as the day nears.

Attracting and retaining the right talent is hard enough for an SME, let alone trying to construct a successful succession plan. But like the individuals, employers need to think about retirement – and it's best not to leave it too late.

Grant Sanders, practice manager at Stephen Rimmer, says: "The SRA and indemnity insurers, among others, will expect to see a plan for the future, which should include plans for succession.

"Succession is a complex issue, but a well-thought-out plan will provide continuity of services to clients, financial stability of the firm, staff welfare and flexibility for the desired exit – and all these will, hopefully, be reconciled with the overall objectives of the business."

He adds that looking three years ahead is considered about right, with an (at least) annual review to make sure nothing strays off track.

Carbon Law Partners founder and CEO Michael Burne says: "The legal sector is bedevilled with a problem; the pyramid structure in most larger law firms means that when lawyers hit a certain age, they need to move up and out of the equity. And this creates tension inside firms as more senior lawyers near that 'retirement' day."

CLIENT CONTINUITY COUNTS

David Evans, managing partner at Enoch Evans, says the biggest challenge is maintaining continuity of work for clients.

"If a lawyer retires or decides to leave us, the head of the relevant department sits down with the employee or partner to start moving work. Those taking on the new work will meet the clients before the person leaves where possible."

As part of the firm's succession programme, he says, lawyers have a handover procedure where the new lawyer, free of charge, does a complete review of the file and will write to the client with an assessment of the work that's been done and what still needs to be done – fees might also be discussed here.

"The retiring lawyer is then required to put everything in order to prevent documents being left in cabinets and, often, forgotten about. Fortunately, electronic files make it harder for that to happen, but it's still good practice to ensure it's applied and that all matters are resolved."

Carbon runs a different model to most law firms – its lawyers act almost as individual businesses and benefit from being a part of the firm in a number of ways, such as use of technology, business support and so on. This also means its approach to succession planning is different to that of many more traditional firms.

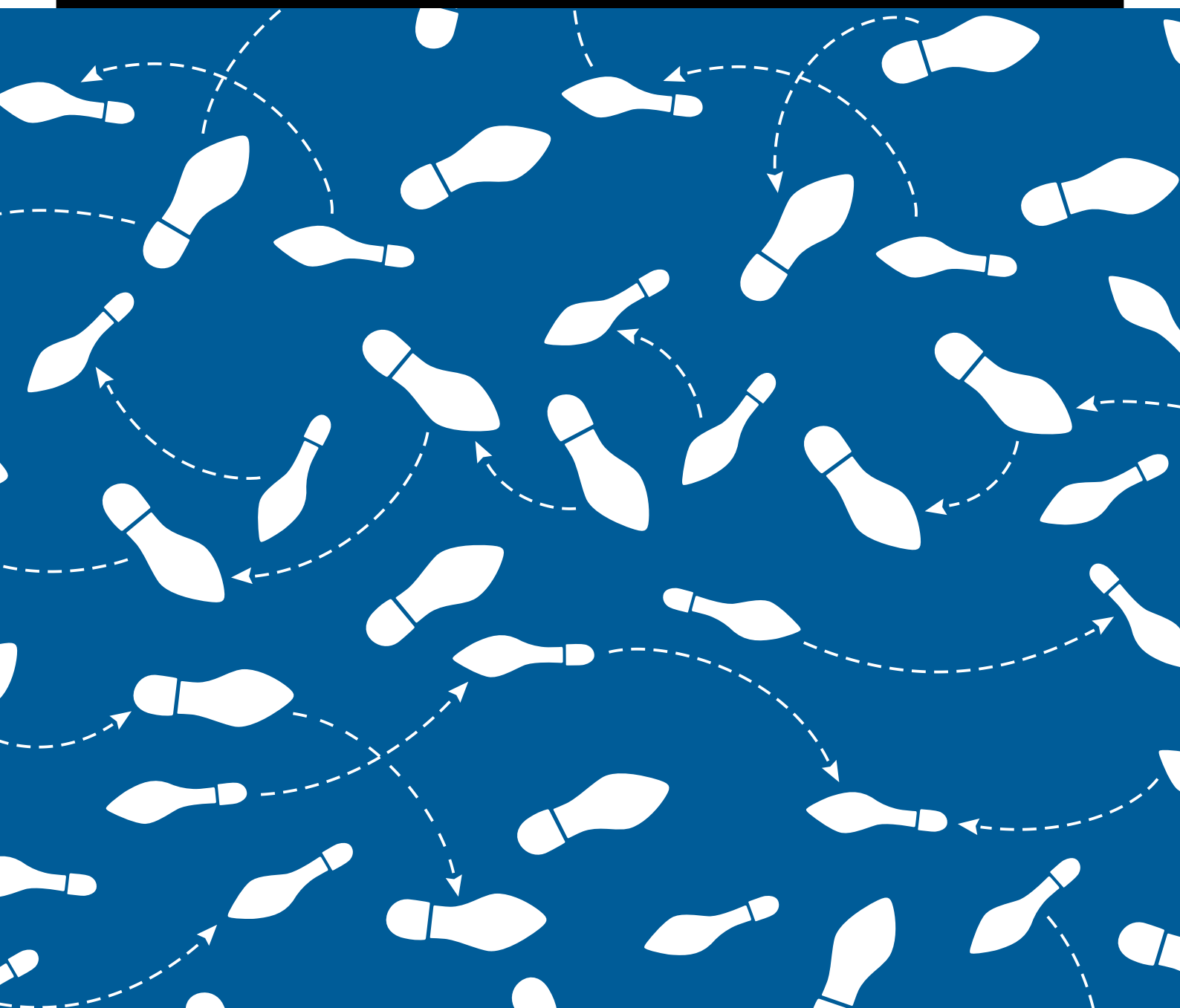
Burne says: "There's a really important and fundamental concept that lies at the heart of our business, and that's freedom in retirement."

Lawyers can stop practising in a variety of ways, he says – the firm can take over responsibility of the clients and will find a successor or they can choose to bring in their own successor, and enter any economic arrangements they like. Obviously, the successor has to fit the profile of the work and be approved by the firm from a risk and regulatory compliance perspective, he adds.

"The whole start point for our retirement model comes from St James's Place and other financial services firms, where they offer what's called practice buyout. When someone wants to retire or leave, they allow partners to transfer their client base to another St James's Place adviser on commercial terms."

That's all well and good for the lawyers, but what about business support and management at SME law firms?

Sanders at Stephen Rimmer says that, not long



ago, you might have had one or two people – and this will still be the case for those on the smaller end of the SME firms – who were the owner, manager, supervisor, technician and rainmaker.

“Ideally, these roles will be shared out among a few in the organisation. And in larger organisations, you might find that these roles are doubled up, so that if one person was nearing retirement then the replacement would already be in a position to take over the responsibility.

“If you are able to identify ‘deputies’ like this, you could save the time and expense involved in recruiting either a ready-made manager or someone who has the potential but might still require nurturing.”

Evans says Enoch Evans hasn’t had many people in support roles leave the firm – but in the case of a recent senior secretary retiree, she assessed her workload and was shadowed in her last couple weeks.

“In an ideal situation, we’d like to hire before someone leaves, for continuity’s sake. Recently, we’ve been reviewing whether to replace certain

support roles, because so much is now automated.”

He says that the firm is now fully paperless and outsources its typing. It also has a fully integrated IT infrastructure, which means that all client work is accessible to all staff. The world is moving on and lawyers are much more self-sufficient than they used to be because of advances in technology.

“Technology is essential for modern law firms due to the speed required to respond to clients and the number of processes that now automated. Therefore, it’s also a consideration when someone leaves and for general succession planning.”



Succession is a complex issue, but a well thought out plan will provide continuity of services to clients, financial stability of the firm, staff welfare and flexibility for the desired exit

Grant Sanders, practice manager, Stephen Rimmer

MAKING A MANAGER

Succession planning can often fall by the wayside – firms go through the motions, hiring and promoting staff as and when necessary, because it'll all work out when it needs to happen. But this sort of thinking won't scale, and with good work-life balance becoming more ingrained in the legal sector, firms are expected to be thinking about the wellbeing and development of its staff.

Evans says: "I come across a lot of partners who have not thought about succession, and retirement creeps up on them. Anyone nearing retirement must keep an eye on their situation with work and finances; it's only logical that the same applies to any manager of a good law firm. They need to think about exit routes for everyone and a big part of this whole retirement piece means that you need new people coming in."

He says that hiring quality staff is very difficult. "A lot of people are lured in by the image of life in the City and the promise of big salaries. Finding good people who want to be in a small town is hard."

"We've been taking on more apprentices recently. We're mindful that some of the best teams we have, have been trained by us. And we want to build on that."

Burne at Carbon agrees: "Your succession thinking should include continuously looking for people to join and who you want to build upon the business. We're bringing in future leaders, full stop."

Carbon has been seeing a development in its business from the retiree community. "They shouldn't be forced to retire at a certain age, and they should be able to get value from the practice they've helped to build over the years."

The firm has hired a number of people recently, from early 30s to late 70s, who come to the firm with retirement in mind. "What happens is most firms don't address succession planning because they're much more fixated on the engine room of growth. And for a small firm, even if you have a team of salaried partners and associates working with you, you may not have someone ready to take the equity off you."

Burne says firms should have a late career management plan. "The earlier you plan the better. When you've built up the firm and are increasing partners from 5 to 20, if one of them leaves and gives back their equity points to share out among the young, how are you going to go about that?"

"How are you going to make sure that the retiree feels valued, incentivised and motivated right up to their retirement? A late career

management plan values and will pay respect to the service of the people that have been there building a business for you over time."

To a similar sentiment, Sanders at Stephen Rimmer says: "Internally, everyone's development is discussed at 1-2-1s and appraisals with an objective setting. It's important to have honest conversations around how they move from where they are to their desired role."

"If potential is seen in someone and they want to move in that direction, then coaching, training and support can become focused. Succession, although planned, should also be a natural transition and not focused on someone who doesn't want it."

Evans adds that, for the firm's internal promotion and succession selection process, it's often down to good old-fashioned gut feel.

"Like most businesses, all of the lawyers have monthly meetings with the head of department and an annual appraisal. If we identify someone suited to move up the partnership – does the person look, feel, sound and behave right for us? – we want to grab them as soon as we can and discuss career advancement options and training."

NEXT STAGES

Burne points out that retirement is not a cliff edge; it should actually be a really exciting time. "The retiree should be thinking about the freedom to have a portfolio career, work with charities or as a non-exec director, maybe even continue to do some legal work. Retirement is not an end, it's a start. Both the business and the individual should keep this in mind."

Succession planning has many aspects, says Sanders at Stephen Rimmer, including financial considerations, possible restructures or merger-related issues as well as the client relationship management. "This has been the driver, certainly at this firm, for retiring partners to stay on as consultants for a fixed period to facilitate an as smooth as possible exit from the partnership structure."

Evans at Enoch Evans says, before the firm's current succession plan there wasn't really a system in place at all – lawyers were just asked to finish as much as they possibly could and after they had retired, other lawyers had to pick up the pieces.

"Over the years, we realised that improving succession planning was also a key part of client care. We've tried different ways of approaching succession, and it's ever changing since the needs of clients change. The important thing is

LPM FIRM FACTS

Stephen Rimmer

Revenue: £5.2m

Corporate status: LLP

40 fee earners, 89 total staff

Offices: Eastbourne, Hastings

LPM FIRM FACTS

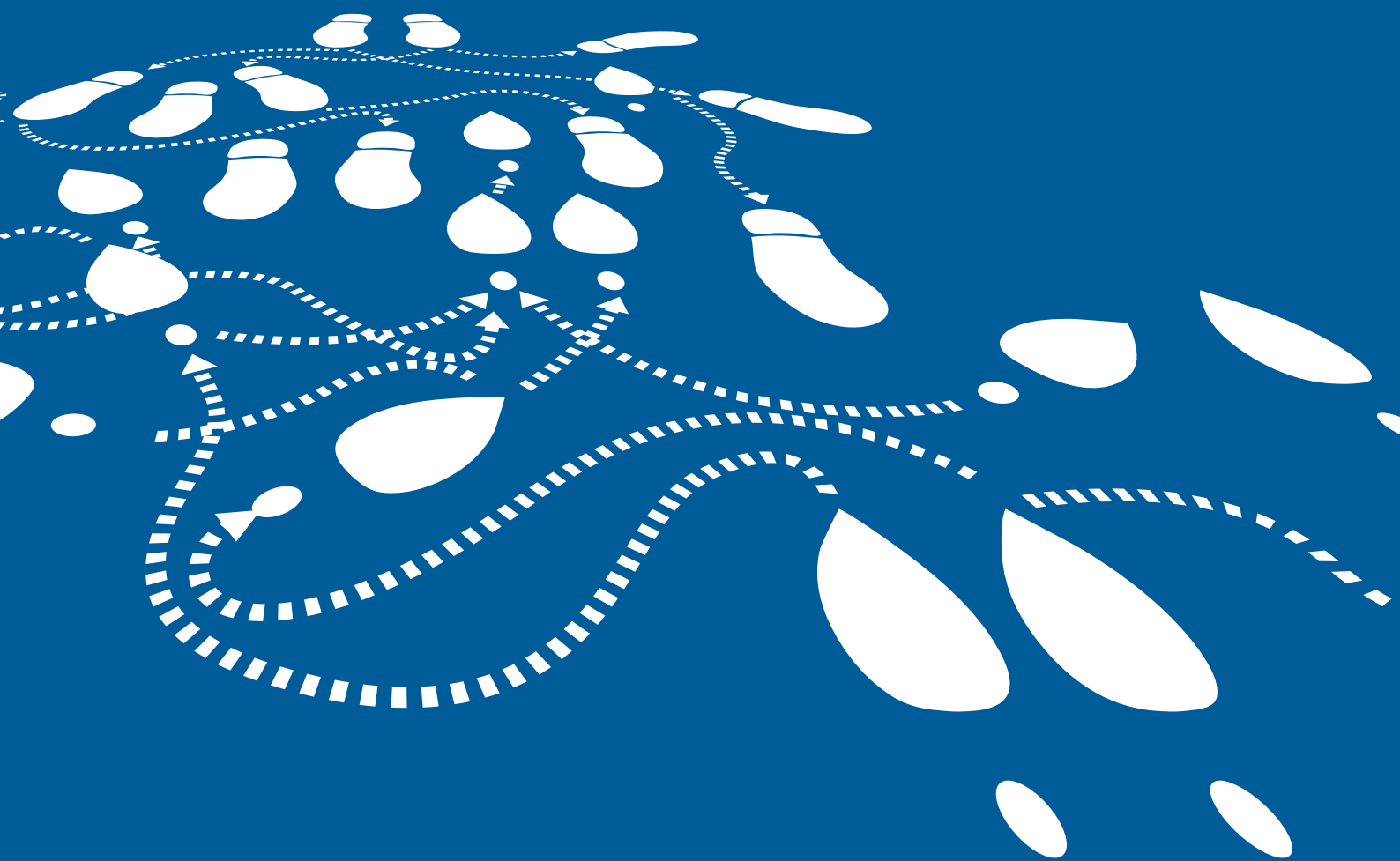
Carbon Law Partners

Revenue: Undisclosed

Corporate status: Ltd (ABS)

32 partners, 44 total staff

Offices: Cardiff, London, Bristol, Birmingham



Our staff's career management starts on the day they arrive and finishes on the day they leave – it should be personal but relevant to the business's objectives

Michael Burne, founder and CEO, Carbon Law Partners

that if a lawyer leaves or retires the client does not suffer."

The approach even varies across the firm. "It depends on the circumstances, the person leaving and the practice area they work in – someone in conveyancing will have a different handover procedure than someone in litigation, for example. But what we try to do is to make sure that the list of matters for each client is as small as possible when the lawyer leaves."

Burne at Carbon agrees that the most significant thing to having a succession plan is to be working on it all of the time; not to do it at the last minute when it becomes an emergency.

"Because of the natural cycle of life, people get older and are going to need to stop and firms need to renew and change. It's obvious, but firms don't always think about it. It happens to us all, and you're going to need to have a plan for each individual that links to the firm's business needs and the aspirations of the person."

There are several audiences watching how retirees are treated by larger firms. That includes the partners moving towards that time themselves and younger lawyers wondering what will be in store for them in mid and late career management.

"Businesses should ask themselves, what type of business do we want to be? For us, we want to be primarily human. Our staff's career management starts on the day they arrive and finishes on the day they leave – it should be personal but relevant to the business's objectives," says Burne.

Business is personal. Firms need to think about working with their staff – fee earners and support alike – to create an adaptable career plan that will see them through from start to finish. No matter how nonlinear that path may end up, not having a plan in place could become a huge risk to the firm and not very respectful of staff. **LPM**

LPM FIRM FACTS

Enoch Evans

Revenue: £4.5m

Corporate status: LLP

46 fee earners, 87 total staff

Offices: Walsall, Birmingham



Simons Muirhead & Burton Media masters

Kayli Olson talks to Simons Muirhead & Burton about growth and how a key client influenced the firm's move to a new office space and new way of working

Simons Muirhead & Burton (SM&B) has changed a lot over the years. "Our vision has changed commensurately," says managing partner Razi Mireskandari. It started in 1972 as a criminal and human rights firm – civil liberties has always been a big part of its agenda. At the time, around 85% of the work was crime-related. Crime now makes up less than 5% of the firm's work – it mainly deals with white-collar crime and high-profile people.

"We gave up legal aid when the cuts hit so deep that we couldn't give the level of advice we wanted to as a firm. But civil liberties is still important to us and we support it in other ways such as access to justice, either by doing pro bono cases or taking on no-win no-fee work, even if it's risky," he explains.

And a big part of the firm over the last 30 years has been the Death Penalty Project, which represents anyone facing the death penalty outside of the US – and it is now set up as a separate charity through the firm.

SM&B is now a full-service firm but with a media bias, he says – it has corporate and commercial practice areas, which include tech/fintech, film/TV, and civil litigation, employment, music, family, property, as well as crime.

From left to right: Chloe Gunn, executive assistant; Marco Cura, ICT manager; Peter Weiss, partner; Razi Mireskandari, managing partner; Amanda Smylie, practice director

Photo credit: Jonathan Goldberg

SM&B^{LLP}



LPM FIRM FACTS

Simons Muirhead & Burton

Revenue: £16.7m

Corporate status: LLP

107 fee earners, 142 total staff

Office: London

A CLIENT'S CARE

Partner Peter Weiss says the firm is well-connected. "We work with a lot of creatives and technological people. It's interesting being their lead adviser and guiding them through whatever process we can to help them get the best results."

A new office design was largely influenced by one of its biggest clients in publishing. Mireskandari says, "Before the move to a new space in July 2018, a client invited us to have a look at its offices and how it operates in more detail. We ended up using the same fit-out company."

But the influence didn't stop there. "There are a lot of processes and policies that staff needed to be aware of, from dress code to use of desks, lockers and so on."

"As our client went through the same process, they were nice enough to let us use their blueprints to build on for what we wanted to do. It was a great help and classic example of how understanding how clients work can influence how we work – very literally in this case. And now, as the way we work almost directly reflects how they work, when clients come in it feels a whole lot more familiar for them."

He points out that clients shouldn't feel discomfort when walking into a law firm office, though it can often be the case. "It's great to have clients come in and feel like they can connect with us as they do with their own colleagues and easily engage with the business."

However, he adds, SM&B would have moved to open plan, but probably wouldn't have implemented agile working at the same time as the move.

In order to work properly in an agile office, the firm needed the right IT in place. Marco Cura, ICT manager, says: "This includes everything from telephony –

which is a big challenge to get right – to staff security in and out of the office. Everyone now has their own laptop and locker, and we've been able to successfully introduce agile working across most of the firm."

Another big challenge for SM&B as it grows is to maintain a sense of community and culture, Mireskandari says. "It's easy to lose the ethos when people stop remembering everyone's names. You have to identify your brand clearly and communicate it in a more engaging and concrete way than simply getting people to be aware."

PEOPLE PRACTICE

SM&B has also evolved in other ways. Amanda Smylie, now practice director at the firm, says her role has changed a lot even in the last six months. Having joined as a legal cashier over 20 years ago, she

became an accounts manager, then took on responsibilities as office manager before sitting in her current role.

"We've grown a lot but, as Razi says, that ethos has managed to stay the same. We're still one big family and everyone is truly passionate about the work they do here," she says.

Weiss adds: "Part of that success is due to the firm's brand and strategy group, which exists so we can take a much more collective approach and we have agreed on something that reflects who we are and what our new communication strategy will be."

The evolution continues. Mireskandari says there are a number of areas and processes the firm is looking to improve. "Certain types of bespoke contracts in employment law could do with some digitisation. But it's important for us to remember that we're still a firm of people who talk to people and we don't want to turn into a machine."

"So we're exploring those possibilities, as well as investing in our business development. It's a challenging process and requires a lot of research to find the right product and we're very conscious as to where we put our money and how it's going to be of benefit. Some things just strengthen ties with existing clients while others drive new growth."

Cura adds that part of the focus on BD is a drive to be more data-driven. "We don't want to lose our people ethos but nevertheless we're very aware that we need to get into a space where we can gain insights with data to help improve service to clients and so on."

Mireskandari says having a mixture of that personal touch in advice and the use of technology will make it easier for clients to access services. **LPM**



Before the move to a new space in July 2018, a client invited us to have a look at its offices and how it operates in more detail. We ended up using the same fit-out company

Razi Mireskandari, managing partner

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LEGAL PRACTICE MANAGEMENT

LPM CONFERENCES

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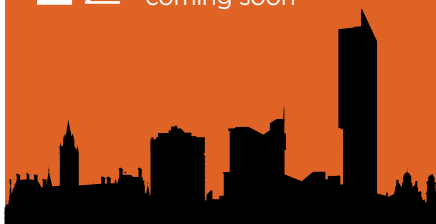
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52 BECOME 13



Richard Hill, chairman of the Institute of Legal Finance and Management, on how the new SRA Accounts Rules will mean new challenges for finance and administration compliance officers

The compliance officer for finance and administration (COFA) role is nearly seven years old and there are still mixed views on the purpose and success of the role in becoming, along with the compliance officer for legal practice (COLP), the lynchpin – or, some might say, Solicitors Regulation Authority (SRA) ‘watchdog’ – of compliance and governance. In less than a year after it was introduced the SRA began a review into the role, triggered by the need to review the accountant’s report and concerns around the financial stability of law firms, which ended up with the COLP and managers of law firms being responsible for financial stability.

COFAs now have a new challenge (or some may think nothing has changed) with the new SRA Accounts Rules coming into play on 25 November 2019. The prescriptive 52 rules of old are being culled down to 13 definitions with less detail and no guidance notes. Herein lies a challenge but also an opportunity for some.

The challenge will be adapting the historic approach and systems found in the detailed rules, specific timeframes and comprehensive record-keeping requirements to the new principle-based framework. COFAs will need to ensure the removal of rules does not allow for complacency, and they’ll need to think about how they will keep everyone in line without the often illusory certainty of prescriptive rules. Those familiar with following in-depth rules had hoped for

more detailed guidance from the SRA to sit alongside the new rules but the SRA will be conscious of giving too much by the way of exhaustive guidance, which might contradict its new principles-based approach.

The old rules can still be followed and firms will remain mostly compliant. The opportunity could be for some firms to take a more flexible approach, which might better suit their business needs, without worrying about unnecessary rules and processes. The importance of COFAs and the culture of firms will be apparent as some COFAs have already said they will have to grapple with the perception that certain aspects are not required anymore, owing to them being ‘silent’ in the new rules, which is simply not the case. Others will understand that it’s not a move away from the philosophy to protect client money with sound management and internal processes.

COFAs should also use the opportunity to review and refresh their own role and protocols for protecting client money. In the next few editions of this COFA column we’ll explore some of the key areas of interest for COFAs, including the banking facility rule, breach management and how to protect yourselves in the role.

If you do have any questions on the COFA role, please do contact the ILFM (www.ilfm.org.uk). The ILFM will also have a ‘COFA Corner’ stand at the LPM South and North 2020 events to help and discuss COFA dilemmas with any delegates. **LPM**



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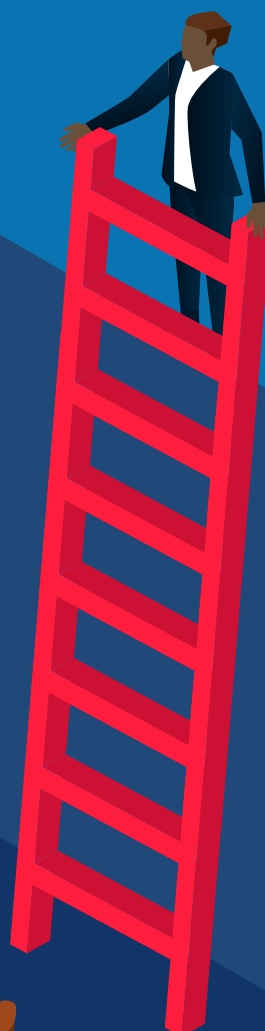
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FACING THE FACTS

Are you reading fact or opinion? Amy Simpson, content marketing manager at LexisNexis, examines the validity of information, and how lawyers can get to the whole truth with efficiency, clarity and precision

If you have ever run an internet search and remained dubious about the results, you're not the only one. These days, it's becoming increasingly difficult to find trusted information sources on the internet. In fact, 70% of us in the UK are concerned that what we read online is untrue.

Research has shown that it costs five times more to attract a new customer than it does to retain an existing one. With an online search, it's almost impossible to be sure of the validity of the data you are looking at, or whether you are reading the absolute latest information.

Can we, and should we, trust those free online sources with our reputation? How much time is wasted checking and validating free information? Can clients be better served by improving the research and checking process?

DON'T GO IT ALONE

Most people would agree that checking your work is important. Whether this process involves a friend reading over what you've written, or a colleague using tracked changes to give you their thoughts on sentence structure or style. A second opinion makes a difference.

Unfortunately, for lawyers, this process is not that straightforward. Even if the error itself appears small, the potential ramifications of a

document going out referencing the wrong client, case law or sum of money, are hugely significant.

Currently, we're seeing lawyers turn to technology to support them in fulfilling their jobs more efficiently. Technology can allow them to focus on what really matters: their clients.

Technology adoption can help lawyers complete client queries faster, spend more time focusing on the client issues directly, and focus on the legal problem itself. Software can give you instant clarification on points of law, give practical guidance and provide links to primary sources and daily alerts on key developments in your practice area. Typographical or editing errors can be checked by technology that understands legal writing. It can even spot and fix referencing and pagination errors.

With LexisPSL and LexisDraft, for example, you essentially have a large team of specialist lawyers looking over your shoulder and helping. They ensure the products and tools are always up to date and relevant.

Documentation and drafts take a significant amount of time to produce and review. If you can increase productivity and accuracy by checking documents faster, you will have more time to focus on your clients. You can be confident the information you are sharing is correct.

LEGAL LEGWORK

Considering the demands of the profession today, lawyers are finding new ways to work on improving the efficiency of researching client queries, checking their work and drafting documentation.

A key challenge for legal professionals is that their clients expect them to instantly offer accurate legal and regulatory information. Contracts are also expected to go out of the door seamlessly, without error or misinterpretations. That's a lot of legwork for anyone. Not to mention tackling the inevitable pile of tasks that build up: from practice compliance, adherence to constantly changing Solicitors Regulation Authority regulations,



Documentation and drafts take a significant amount of time to produce and review. If you can increase productivity and accuracy by checking documents faster, you will have more time to focus on your clients



keeping up-to-date on legal changes, staff management, marketing – the list goes on.

Investing in the correct software application can create efficiencies in drafting and documenting. Using the right software, with just one click, you can quickly access all the law you need for a client's case. Immediately access the toolkits, checklists and practice notes relevant to your work. Knowing the important legislation is one thing, but quickly understanding what practically needs to be considered and done is another.

If a trained professional support lawyer (PSL) has previously trodden that path, recorded the information with direct links to primary sources and case law, why not use it to get a step ahead? Using legal tech is a bit like adding an extra resource to your team – you can bolster the depth and breadth of your casework, and free up time to address other things.

RESEARCH LAYERS

It is unequivocally important to ground your argument in authoritative primary sources. But, research doesn't need to be time consuming. You

can use technology to make it more efficient. Tools like LexisPSL allow you to 'layer' your research approach – quickly read summaries, dive into practice notes or, with just one click, read the detail.

Depending on the case, it's not always necessary to peruse the detailed case law and legislation – how the law has changed over time, the in-depth case notes, and so on. In many cases, this information is only needed if a previous version of the law applies.

The law, and the lawyer's role, can be incredibly complex, and increasingly time-pressured these days. There will be cases that require time and detail, and those that can be completed quickly without too much research. Find the balance between the two and use a tool that gives you the high-level and detailed view on the law.

So, there is no need to put your reputation on the line. LexisNexis gives you access to the original case law and legislation, factual summaries of the law and implementation notes. Software and precedents should make your life simpler. It's never worth the risk of not checking your work. **LPM**

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APP CLIENT COMFORT

Cook & Talbot director Mark Lloyd and communications manager Vicky Noren-Dobson explain how Perfect Portal has helped the firm keep both itself and its clients up to date

Many firms have illustrious histories, but Southport-based Cook & Talbot has been around for an impressive 120 years, and director Mark Lloyd would like the firm to continue to be forward-thinking and relevant for years to come. The firm, Lloyd explains, conducts commercial matters but is heavily dependent on non-contentious work, such as conveyancing.

"We want to grow our already large residential conveyancing department and expand in the commercial area over the next two to three years and bring on board more fee earners," he says.

Accordingly, the firm wants to use technology to transform the way it operates. "We're trying to speed processes up, improve efficiency, reduce costs and provide clients with real-time information."

A cornerstone of that strategy has been the firm's partnership with Perfect Portal, and the

firm has embraced the latest app-based features to address a number of business challenges.

SAVING PRIVATE TIME

One such area of improvement is the need for real-time information. Client expectations, says communications manager Vicky Noren-Dobson, have been transformed in recent years by technological change. "The biggest request we get from clients is real-time updates – they want an update and they want it pretty much there and then."

This demands a considerable amount of limited firm resources, Noren-Dobson says – but Perfect Portal has both alleviated pressure on the firm and created a more user-friendly experience. "The app helps to keep clients updated on a transaction every step of the way."

If the case is being worked on, clients receive

LPM FIRM FACTS

Cook & Talbot

Revenue: Undisclosed

Corporate status: Ltd

7 fee earners, 25 total staff

Office: Southport



We're still a small, traditional practice, but having access to this kind of app sets us apart from our local competition. It's a modern-looking platform and it's very user-friendly – it has certainly had a positive impact on trying to secure new business from other sources

a notification about it to their mobile device, radically reducing the need for telephone calls or email, she says.

The increasing complexity of transactions and the information expectations of all parties has also increased, Noren-Dobson says.

"Nowadays, it's not just the client who wants to stay updated, it's the referral company, the broker, the agent. Our workload around updating everyone has quadrupled."

She says that the app has helped to streamline the process of keeping all of these parties updated, cutting down on time spent communicating manually.

Though the firm has yet to gather concrete metrics, Noren-Dobson estimates that telephone traffic has already decreased by approximately 15% owing to the implementation of the app, and requests for manual updates from clients has reduced by between 15% to 20%.

Though this is a great efficiency win for the firm, it's also what clients are already demanding, Noren-Dobson says. "We've identified that clients generally prefer updates by the app, rather than the old-fashioned way of manually logging into a case, entering their email address and password. Young professionals in particular want to access these things when they're not able to make a phone call."

PROFILING SUCCESS

The firm has seen some evidence that there has been some softening in the market over the last 12 months. Although improving the experience for clients is an important priority, raising the firm's profile to secure new business has also been important for the firm, as Lloyd says. Noren-Dobson adds that the firm had identified a huge need to increase its digital marketing profile in order to grow and stay competitive. The use of Perfect Portal has helped the firm differentiate itself from its rivals and become client centric.

She says that the feedback from clients, now largely generated through the Google review

platform rather than more manual methods, has been extremely positive. "They've had a good experience with the firm, so hopefully we can secure repeat business from clients who have instructed us before, via Perfect Portal."

And Lloyd agrees: "We're still a small, traditional practice, but having access to this kind of app sets us apart from our local competition. It's a modern-looking platform and it's very user-friendly – it has certainly had a positive impact on trying to secure new business from other sources."

One such avenue is an agreement that the firm recently made with a referral company, which loved the app and online system. "They've never seen anything like it before. So, we've managed to secure a big referral agreement, in part because of the Referrer app from Perfect Portal," Noren-Dobson says.

The referral companies are now more engaged and they're able to generate instant fully branded quotes on behalf of Cook & Talbot, Noren-Dobson continues – constantly securing work for the firm. "That's a big time-saving exercise for us – we can chase the quotes up as all the necessary information gets automatically added to our firm's portal after the referral companies have filled the client details on their Referrer app."

RELATIONSHIP GOALS

Lloyd explains that both Cook & Talbot and the technology have evolved over time, with Perfect Portal being live at the firm for three years – and that the relationship has been strong throughout that time. "Nothing is too much trouble, and we feel quite fortunate to have such a strong business relationship with them."

As part of maintaining that relationship, Noren-Dobson says that she has a monthly one-to-one session with a Perfect Portal representative, which offers the chance to address any potential issues or throw around any new ideas. For instance, she says the firm has recently updated some of its key stages in the app to better reflect how Cook & Talbot works.

"It's great that there's the flexibility and autonomy to do that. They've also encouraged us to create a quote platform on our website, so we'll be working with them on that to secure new business directly from our website," she adds.

Noren-Dobson also explains that the next big step on the road with Perfect Portal is the launch of an online chat platform, which will enable clients to talk to someone at Cook & Talbot via the app for support or updates.

It's a two-way relationship, she says. "We're constantly working with them and, if we've got anything we feel we can add, they listen to us." It sounds like the portal to success is wide open for Cook & Talbot. **LPM**

ABOUT US

Perfect Portal is a new business management system that uses an online platform to empower legal professionals to take advantage of opportunities.

www.perfectportal.co.uk





Dean Sappey, CEO at DocsCorp, outlines how the company intends to keep its family of products working harmoniously with one another, and with the outside world

In July 2019, British Airways became the recipient of the largest ever fine handed down by the Information Commissioner's Office for General Data Protection Regulation (GDPR) related data breaches. It was provisionally charged £183m, pending an appeal, for failing to prevent malicious hackers from stealing the private information of 500,000 users of its website. That substantial fine is still less than the theoretical maximum fine of 4% of a business's turnover, a new upper limit that came into effect after the UK's implementation of legislation intended to parallel the EU's GDPR.

Even putting aside the possibility of malicious hacking attempts, SME law firms need to be sure they can prevent breaches – even purely accidental ones. Document mismanagement and communication errors can lead to a breach – a possibility to which DocsCorp CEO Dean Sappey says firms may not be paying enough attention.

Such accidental breaches have occurred more recently in the US but Sappey won't be surprised when it eventually happens in the UK. "We saw it recently with a large US law firm that didn't properly redact information in a document – reputational damage and the potential for lost business is a big risk, and much harder to calculate than the cost of fines. But when it happens, you'll know about it."

But, he says SME law firms are beginning to realise

that. While larger firms may well be the prime targets of malicious actors, that doesn't prevent SMEs from losing revenue to fines or loss of business.

"We are seeing SME firms recognise that, while they might not have many multimillion-dollar clients, they still have a select number that generate a large share of their business. Losing that client because of a data breach could mean the loss of a big percentage of their revenue."

And a higher reliance on a smaller number of clients could well make SME firms less able to withstand fines, loss of business and even clients taking action against them, than bigger firms.

Sappey feels there is a route to progress. "The first step for SME firms is just educating them on the risks and some solutions – showing them that it's actually really easy to solve these issues. A couple of minutes to install software is all it really takes and the problem can be solved."

POSITIVELY PRODUCING

However, aside from security issues, Sappey says he'd like to nudge firms into addressing complacency around processes. "There's perhaps a tendency to feel that something has always been done in a certain way, and that's therefore the only way to do it, rather than thinking there must be more efficient



There's perhaps a tendency to feel that something has always been done in a certain way, and that's therefore the only way to do it, rather than thinking there must be more efficient and easier ways

and easier ways.”

Sappey says that the company's historical purpose, and its ongoing ambition, has been to support firms in managing document workflows more efficiently. “We're not creating the document contents, but we're helping to facilitate the collating, comparing and sharing of documents, enabling people to edit and work more efficiently, as well as doing that securely – by making sure you're not sending them to the wrong people.”

What the firm is not interested in doing, however, is merely making iterative improvements to existing products. “What's more important is sitting down with people at firms and asking what they're still doing manually, and then figuring out how we can develop a new technology that completely revolutionises or improves on that process.” So, while DocsCorp continues to add more features and functions to existing products, it's also looking to add entirely new applications to its roster.

Another way the company is looking to support firms is by facilitating a seamless software experience. “Some vendors will offer a whole range of different software tools, but they all work differently – that's not really achieving what clients want. They don't want something that looks cobbled together.”

It's important, he says, that firms are able to have one point of contact they can call to get the support they need, and that all the applications in the document lifecycle look and work the same.

This native uniformity, he adds, should make user adoption easier, as staff can be trained on one product or application and immediately know how to use the others in the same suite. “In most cases, lawyers just don't have time to attend training. In fact, we've seen firms struggle to get training rolled out to both fee earners and business services staff – that's why we want all our products to work the same, install the same, and be supported the same. It just makes life that much easier for the users.”

deliver a much more consistent output.

“It's not just about productivity in terms of hours saved – it's improvements in the quality and the consistency of the work. SME firms can deliver the same level of quality as larger organisations at a lower cost – it's about helping them seem as professional as a large firm, but with the personalised service of a smaller firm.”

One big challenge across the industry, however, is the ever-shifting landscape of practice and document management technology updates and innovations.

Sappey says: “We've seen a lot of private equity investment coming into the legal tech area that's really focused on reducing costs. But, if they're not spending money on product development, they're not modernising and updating their products anywhere near as fast as they need to. If a new version of Windows comes out, you might have to update your software to support it literally the next day.”

DocsCorp has recently announced several new integrations to keep up with the web of changes, most recently in September 2019.

“We're connecting iManage's Security Policy Manager product with our cleanDocs application so that firms can manage who staff are emailing and implement appropriate rules, depending on who the client is. We've also recently partnered with NetDocuments, connecting contentCrawler cloud - OCR processing technology - to make all its users' documents searchable.”

Interestingly, Sappey points out that these two companies compete with each other, but that DocsCorp works with both to develop and promote joint solutions. “I like to say that we're the ‘Switzerland’ of document productivity tools – we work across firms of all sizes and with all of the products they use to be a unifying platform.”

He says that means DocsCorp staff spend a lot of time speaking to other vendors to make sure everything works together – but that's just part of the job. “We want to make a total solution that's right for the client.” And that's why, he says, a big priority for him is recruiting the right people for the company, who want to contribute to that vision: “It's not just a business, it's a service that we're providing to our customers. That's why we want our people to be inspired by what we do.” **LPM**

ABOUT US

DocsCorp provides easy-to-use software that empowers law firms to work safer and smarter. It has more than 500,000 users in 67 countries who rely on its software every day.

www.docscorp.co.uk



KEEPING UP WITH THE NEIGHBOURS

Professionalism is also on Sappey's mind – he says that productivity tools can allow staff to

SECURED TRANSITION

IT director Adele Summers explains how Northern Irish firm Wilson Nesbitt chose IT provider CTS to help it grow and ensure the firm's security would remain up to scratch

Wilson Nesbitt is a full-service law firm with commercial offices in Belfast and volume services offices in Bangor. Among other areas, it handles significant proportions of debt recovery and residential conveyancing matters in Northern Ireland and handles approximately 65% of all the residential remortgage transactions in the country, acting on behalf of many banks and building societies, including eight of the top nine UK lenders.

While ensuring the security of residential clients' personal information is, of course, of the highest priority, Adele Summers, IT director at the firm, says that one of the biggest day-to-day challenges Wilson Nesbitt faces is meeting the stringent standards imposed by banks and other financial institutions.

"There are a range of ever-emerging security requirements, audits and assessments we have to satisfy on a continuous basis. It's always a challenge, for any firm or business, to make sure you're exceeding those requirements, rather than chasing your tail," she says.

A big piece of completing that puzzle is, obviously, getting a firm's IT functions up to scratch. The firm had been with a private cloud IT provider from 2013, but expansion plans drove a review of its medium- and long-term IT infrastructure needs. "The move to hosted services six years ago was an important step forward, but we needed a secure and stable platform compatible with our ambitions. Around 2016 the firm started looking for a new partner."

TECH IT OUT

In addition to data security, Summers says that there were a number of other considerations. "We wanted to find a vendor that would have in-depth knowledge of hosting our applications,

specifically Visualfiles and iManage case management systems, because those are key platforms for us." She also explains that Wilson Nesbitt has developed highly automated case management workflow systems to improve efficiencies – and a new provider would need to keep up with those high-volume business areas and associated IT requirements.

After a year-long tender process, which required vendors to prove their ability to support the server platform and adhere to ISO certification and other security standards, the firm finally chose its partner. "CTS came out head and shoulders above the other potential suppliers – there aren't a huge number of IT companies out there that specialise in legal, and CTS understood the compliance and security aspects we needed, as well as our software applications."

As the firm had been an early adopter of cloud technology via an external IT provider, she says that moving back to in-house infrastructure wasn't a viable solution, as the firm has a large IT operation for a firm of its size. There were other benefits to an external partner, however, including freeing up the internal team to develop business intelligence tasks. "Maintaining the level of IT infrastructure support needed in-house would be a significant cost and, with the right IT partner, you get a high level of expertise. It would be much more difficult to recruit for and maintain that level of knowledge as an SME law firm purely in-house."

Summers also explains that the firm felt an external partner would be better placed to facilitate features such as remote working and, significantly, disaster recovery – the firm now conducts regular exercises around this business-critical feature. "We perform two full disaster recovery tests per year, because clients demand that level of resilience."

ABOUT US

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

www.cts.co.uk



LPM FIRM FACTS

Wilson Nesbitt

Revenue: undisclosed

Corporate status: partnership

59 fee earners, 84 total staff

Offices: Belfast, Bangor



SCALE-OUT CAMPAIGN

In September 2019, the firm moved its Belfast operation to new city centre offices, which offer the firm significant room for expansion, improved meeting facilities for clients and open-space working. It was a significant project for the firm: "It's a big step up in terms of what we're able to offer clients and staff," Summers says. Getting it up and running was aided by the partnership with CTS, she explains. "The new office was a major investment and being in the cloud helped – we didn't need to move a large amount of server architecture. It was far more seamless than we could have expected."

As part of the move over to CTS, and in conjunction with the Belfast office move, the firm also made a major improvement to its communications network, including a full leased line, to provide faultless communications between the offices and the data centre.

As part of the firm's crucial reputation management and client engagement efforts, Summers explains that the decision was made early in 2019 to build on its existing Cyber Essentials credentials and go for Cyber Essentials Plus certification. While the platform provided by CTS was already primed to put the firm in a good position, Summers says that the company also

actively supported the firm and worked with it on assessment points to achieve the certification, all as part of the ongoing relationship between the firm and CTS. "It's a relatively rare achievement in the legal world, so we're quite proud of it," she adds.

More recently, the firm also passed an independent GDPR audit, further solidifying its safety standing. "It demonstrates the firm's commitment to GDPR and information security, and it all dovetails together," she says.

Although the move over to CTS's systems was completed in July 2017, Summers says that the relationship is very much a continuous, collaborative one. The CTS helpdesk offers 24/7 365 days a year support to the in-house professionals around IT requests and support.

"They proactively liaise with our internal team, on a daily basis. CTS feels like an extension of our IT department, rather than a separate entity."

On a more strategic level, Summers says she works frequently with account and project managers to keep IT efforts moving forward, both mid- and long-term, which currently includes a complete refresh of the firm's server architecture. However trying that task might be, Wilson Nesbitt will be going into it safe, secure and supported by a capable partner. **LPM**



MIND FULL?

Gillian Higgins, international criminal barrister at the chambers of 9 Bedford Row and founder of Practical Meditation, gives her top tips on how to incorporate mindfulness throughout the day

Mindfulness involves dropping into our present moment experience and being aware of what we're doing, while we're doing it, with a non-judgmental attitude. It sounds easy, but increasingly it's hard to find time to pause and take stock. Here are five daily mindfulness practices to try at work and home:

1 THE MINDFUL PAUSE

This portable practice involves finding time to pause, breathe, notice your experience and then return to the task in hand. It allows you to step outside your train of thought and is an opportunity to consider how you want to respond. Consciously follow the passage of your in-breath and out-breath, wherever you are. Notice how you feel.

2 THE COMMUTE

If you commute by public transport, choose to give yourself a break from your phone or computer by seeing if, for at least five minutes, you can simply just be. Close your eyes. Let go of any thoughts that arise and return to your breath, using it as a point of focus. Direct your attention to different parts of your body, starting with your feet and moving to the top of your head. You might feel a sense of warmth, a tingling, an ache or nothing at all.

3 MINDFUL EATING

Mindful eating is a form of food meditation. Whether it's a packed lunch from home or a snack en route, before taking your next bite, see if you can adopt a mindful approach and notice the difference it makes. Think about the origins of your food. Notice its imperfections, texture and smell before putting it in your mouth. Allow the food to rest on your tongue before chewing it slowly. Eating in this way allows you to capture tastes, scents and images that would otherwise be missed.

4 MAKING TEA OR COFFEE

When you boil the kettle, take a moment to pause, breathe deeply and stay with the process. Wait for the kettle to boil or the coffee to brew. Let go of any thoughts that come into your mind. Take a moment to smell the aroma, feel the texture of the cup, sense the heat and watch the steam rise. Sit with your drink for a few moments before you take your first sip. Notice how it feels to be present, rather than distracted or elsewhere.

5 MEETINGS

As you walk to your next meeting, take a few deep breaths and take your time to arrive. Once in the room, stay silent for the first few moments, letting everyone arrive physically and mentally. Take in your surroundings and notice how you're sitting. Relax your shoulders, notice your body language and that of others. See if you can truly listen and consider how you engage. See what difference it makes to your experience and engagement. **LPM**



Mindfulness involves dropping into our present moment experience and being aware of what we're doing, while we're doing it, with a non-judgmental attitude.

SOCIAL WORK

What's black and white and red all over? It's the zebra project campfire session on workplaces and spaces. Josh Adcock reports in

In early October, LPM went to hear more from Taylor Vinters' zebra project, this time hosted at a Knotel in Piccadilly, and based around workplaces and spaces. Though there were no marshmallows, James Slinger, a partner at Taylor Vinters, chaired the campfire session, and kicked off proceedings by asking attendees to discuss his assertion that the workplace was becoming more social.

Several attendees agreed, including panellist Anisha Patel, applied research consultant at furniture and workplace design company Steelcase. Where people used to gather in churches, schools and other institutions, she said, employees are now looking for a domestic space at work.

Julian Woolgar, partner at estate agency Knight Frank, agreed that, in our hyper-connected world, a sense of community is an important business consideration.

Much was said about the benefit of collaborative workspaces and informal "collision points" intended to foster creative problem-solving – but, equally, not everyone agreed with those priorities.

One attendee said workspaces need to fit the type of work done, and criticised open-plan spaces. "Sometimes you need deep-thinking spaces, quiet spaces for creative work, almost in the way you might have quiet carriages on a train."

Chen Tang, head of workspace strategy at Knotel, cited the need for focus rooms and other similar design features to accommodate exactly these kinds of different work cultures within a business.

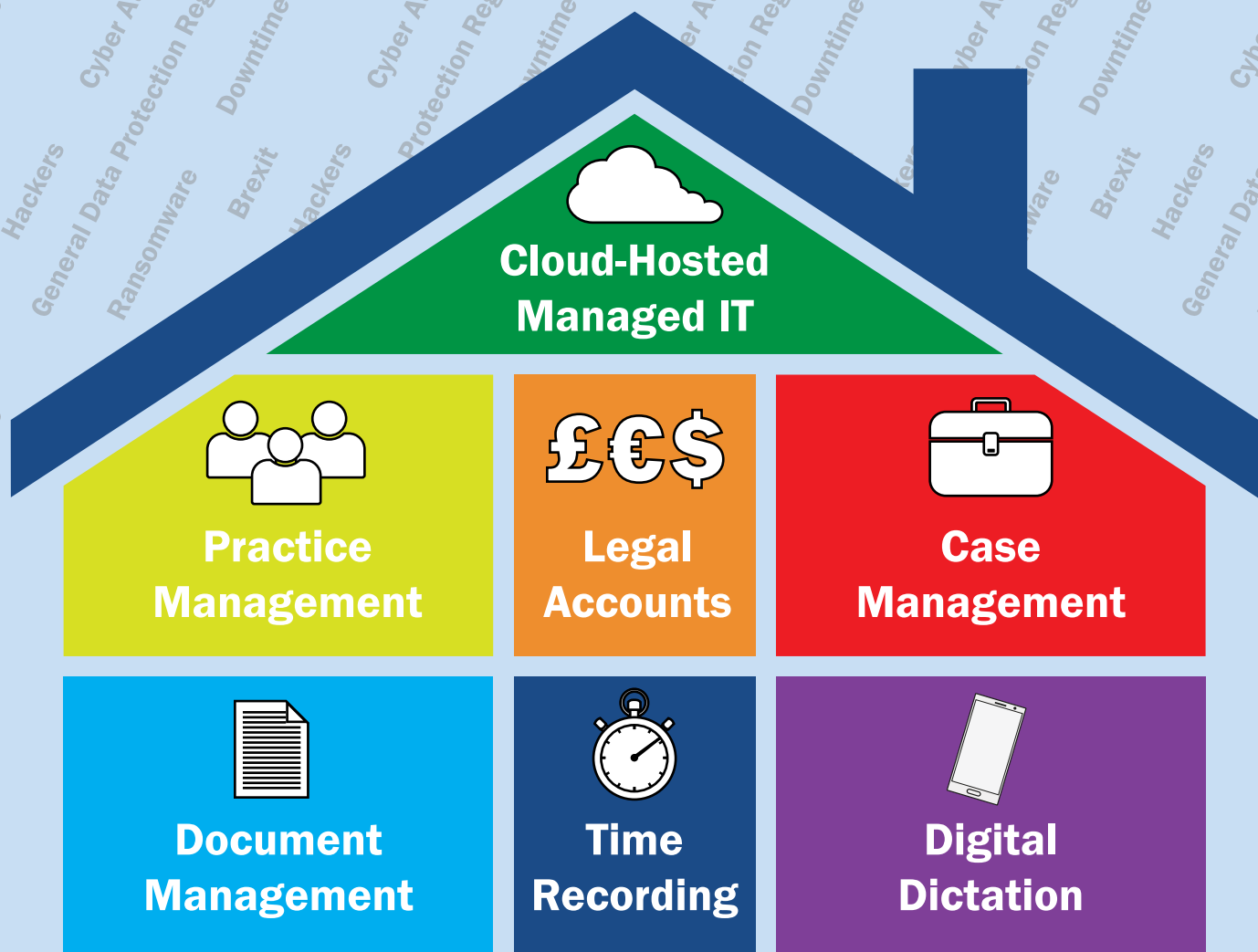
The benefits and growing necessity of accommodating flexible working, and even the prospect of entirely virtual businesses, were also covered, which also joined us up with generational stereotypes. "Graduates don't want to be at home – they want to be in the office and learning – but they want the flexibility to move around too," one of the panellists commented.

A key theme throughout was the idea that working arrangements, including flexible working, must operate on an opt-in basis, rather than being forced on employees. "One of our clients mandated home-working and it didn't feel authentic," said another participant.

The tension between priorities was summed up by Slinger: "How do we satisfy people who want both a community where they can learn while they're at work, and also the demand for flexibility?"

Matt Meyer, Taylor Vinters' CEO, added that businesses need to move from an "effort model" – meaning hours spent in the office – to a "value-creation model", and that workspaces inevitably played into that shift in priorities.

As the conversation turned towards the implications of automation and AI, the so-called fourth industrial revolution and the ever-increasing pace of technological and societal change, Meyer pointed out that it's impossible to talk about workspaces without discussing the education system, brand, company culture or community. The broad, far-reaching nature of those issues highlights exactly why conversations like the zebra project continue to be invaluable. **LPM**



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