NOVEMBER 2019 SUPPLEMENT

LPM
LEGAL PRACTICE MANAGEMENT

BEST PRACTICE MANUAL

A showcase of the shortlisted entries for LPM Practice Excellence Awards 2019

LPM Awards in partnership with:

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2020

LPM PRACTICE EXCELLENCE AWARDS

In association with

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WINNERS ANNOUNCED AT LPM SOUTH

CATEGORY ONE
CLIENT STRATEGY AND ENGAGEMENT
Given for best process or campaign for maintaining and building on client engagement.

CATEGORY TWO
PEOPLE AND ENGAGEMENT
Given for a people-focused initiative, change, programme or similar that demonstrates excellence in human capital innovation or employee engagement.

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FREE ENTRY!

CATEGORY THREE
SERVICE DELIVERY EFFICIENCY OR INNOVATION
Given for a programme/process/business change improving the firm's effectiveness and efficiency.

CATEGORY FOUR
PRACTICE DIRECTOR/ MANAGER OF THE YEAR
Nominate yourself or a colleague for all-round outstanding performance in legal practice management.

CHICKEN DINNER

The inaugural LPM Practice Excellence Awards, officially launched in February 2019, was met with great success – if we do say so ourselves – for its first year. SME law firms could enter into two categories. The people and engagement category was awarded for a people-focused initiative, change, programme or similar that demonstrated excellence in human capital innovation or employee engagement. And the service delivery efficiency or innovation award was given for a programme, process or business change improving the firm's effectiveness and efficiency.

The format for the submissions required firms to describe and provide evidence for their initiative across five sections:

1 Executive summary: Outline the challenge/problem, solution and result briefly and succinctly.

2 The challenge: What commercial problem or business issue was the innovation designed to address?

3 Description of the programme/innovation/project: A brief description of the initiative, including key dates and who was involved – leaders, champions, departments. Ensure (if relevant) to pay attention to originality: Is the project/initiative innovative or original? How?

4 Leadership: What role did the individuals/teams submitted for the award play? For which aspects of the solution, approach, or implementation were the submitted people responsible? How did they arrive at the specific approach or solution that was finally adopted?

5 Impact: What was the impact of the innovation for the client, firm or key stakeholders? How can its success be measured? This must include evidence. Entries may include slides and/or graphs, and the application must show measured/measurable quantitative or qualitative results such as increase in profit or process efficiency, or positive employee questionnaire/client feedback. We only considered applications that involve, as primary or key recipients, our core audience of practice directors/managers, or similar senior business services leaders.

This best practice manual showcases the shortlisted firms' entries from both categories. We hope their initiatives can inspire and drive change across the SME legal sector. As they say, a high tide lifts all boats.

Got an initiative of your own to be recognised? Enter the LPM Awards 2020, details to the left or go to: www.lpmmag.co.uk/lpmawards2020

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WINNER
PEOPLE AND ENGAGEMENT

RAMSDENS

Ramsdens' submission on it's management programme – a modular L&D programme for developing and embedding skills and confidence in business development, client relationship management and leadership

Our Ramsdens management programme (RMP) – launched in 2014 - covers legal, business and finance, practice management, and people skills, providing participants with the tools to become our future partners and leaders. The programme is modular and aims to develop and embed skills and confidence in business development, client relationship management and leadership.

The programme takes a year to complete. It comprises monthly half-day sessions, which include presentations, facilitated case studies, interactive discussions, workshops, course work completed in teams between sessions, and visits from industry experts. They are delivered by an experienced practitioner and supported by senior members of the management team. The sessions explain a range of aspects of law firm management, culminating in the completion of a series of business improvement projects, which are then presented to the partnership.

The RMP fits into the bigger picture at Ramsdens; the programme is made possible by our joined-up approach to talent management, recruitment, professional career development for our lawyers and performance management of all our people. Having grown both organically and through a number of mergers and acquisitions, our RMP is a great opportunity to consolidate the expectations of our leaders in order to gain a consistent calibre of associates and partners.

LPM FIRM FACTS

Ramsdens
Revenue: £15m
Corporate status: LLP
300 total staff
Offices: Bradford, Dewsbury, Easingwold, Edgerton, Elland, Halifax, Holmfirth, Leeds, Huddersfield, Milnsbridge, Mirfield, Slaithwaite, Wakefield, York

> *"Our RMP is a holistic programme offering not just training to our future talent, but establishing and nurturing them as role models and creating peer networks for them. We actively promote a culture of learning within the firm."*

THE CHALLENGE

Our bespoke programme was carefully designed by our senior board and an external industry leader to support and develop the essential management skills needed to be a successful lawyer.

With the goals of both sustaining the firm's competitive position and increasing solicitors' business acumen and skills, the RMP teaches them the critical aspects of finance, marketing, business development, operations and HR management.

From topics such as team building, through to debt reduction through overhead control, the programme increases the business skills and leadership capabilities of solicitors in the core areas of finance, management, strategy and marketing.

THE PROGRAMME

The programme consists of six sessions and includes fulfilling the following objectives for solicitors:

- Enabling them to understand how financial data is generated and reported
- Improving how they organise and develop client relationships through effective business development
- The ability to plan, estimate and develop a business plan
- Building their capabilities for leading teams and managing people that reflects and shares Ramsdens' mission
- Promoting a clear vision about the future
- Building a network across 14 offices and departments.

What participants think of the RMP:

"The course is designed to make participants really think about what leadership means for them in the context of the law firm. I am already putting what I've learned into practice." Cohort 3

"The RMP was helpful and informative. It provided a confidence boost and a platform to develop my skills as a solicitor and manager. I took a lot out of the module on business accounts and feel like I have a good grasp on how to make sense of accounts and business structures. Part of the course focused on people management and I learned some valuable skills, and hopefully kicked into touch some bad habits as a result. Overall the course was enjoyable and was a good way of mixing with peers within the firm who I rarely see." Cohort 2

"The RMP for me was invaluable. I have worked at various levels within Ramsdens for 12 years, eight as a solicitor. The programme focused on the business aspects of running a successful firm, which is something that is taken for granted when you're busy fee earning. I feel much better equipped in my knowledge of the firm and have learned a lot of transferable skills which I am also finding essential in other areas of my life, such as in my role as a trustee at a charitable cause." Cohort 2

"The RMP provided an informative insight into law firm management and leadership. The programme was well delivered and engaging, welcoming different opinions openly. It enhanced my desire to progress with Ramsdens and be part of the future management team." Cohort 1

"The management programme provided an invaluable insight into the workings of the firm and provided me with confidence to take the next steps to being an associate and then partner. I really enjoyed the whole experience and believe that the firm is a better place for it." Cohort 1

IMPACT

To date, 35 employees from across all departments have successfully completed the programme, which has been reviewed and developed further each year. The most recent cohort finished in April 2019, with another intake starting in October 2019.

Each cohort has worked tirelessly to develop best practice in their respective departments as well as driving financial performance.

We are proud of the fact that in terms of gender diversity, 77% of participants have been female and 23% male. Also, 60% have been promoted to senior positions within the business (including seven to partner level).

Paul Joyce, managing partner at Ramsdens said: "Our RMP is a holistic programme offering not just training to our future talent, but establishing and nurturing them as role models and creating peer networks for them. We actively promote a culture of learning within the firm and the RMP exemplifies the firm's strong commitment to the development of its people. Our RMP is definitely all about building tomorrow's leaders."

Being able to lead and sustain change is what the great firms do to stay at the top. With a quarter of our partnership having attended the RMP, we are in a position of strength and our investment in terms of building tomorrow's leaders is what is going to set us apart from our competitors and shape the future of Ramsdens for another 140 years.

Our programme has also received accolades: Highly commended for 'Outstanding commitment to training', Modern law awards 2019; and finalists in the 'Best leadership programme of the year', Yorkshire leadership awards 2018. LPM

PEOPLE AND ENGAGEMENT

HRC LAW

Submission on the development of a personal branding programme to grow and develop business by HRC Law (now merged with Brabners)

In July 2019, four months after being shortlisted for LPM Awards 2019, HRC Law was aqcuired by Brabners – a testament to its success. HRC Law had developed a personal branding programme to grow and develop business, strengthening the firm's brand while raising fee earner profiles and fostering staff retention.

We achieved remarkable results over a period of just over 12 months, including high business growth, new clients, and strong thought leadership.

THE CHALLENGE

Our ethos focuses on approachable, emotionally intelligent, technically excellent, commercially-aware lawyers. They are our strongest asset – our brand ambassadors. Having invested considerable resources in recruitment (in a highly competitive marketplace), we believe providing individuals with self-development opportunities is crucial to retention.

We had three key objectives:

- Business growth: develop new practice areas to extend our service provision into areas with a recognised client need.
- Training and personal development: facilitate lawyers' development – including legal knowledge and capabilities, and deep sector knowhow, thereby reinforcing staff retention.
- Business development: demonstrate the 'personality' within our brand model.

THE PROGRAMME

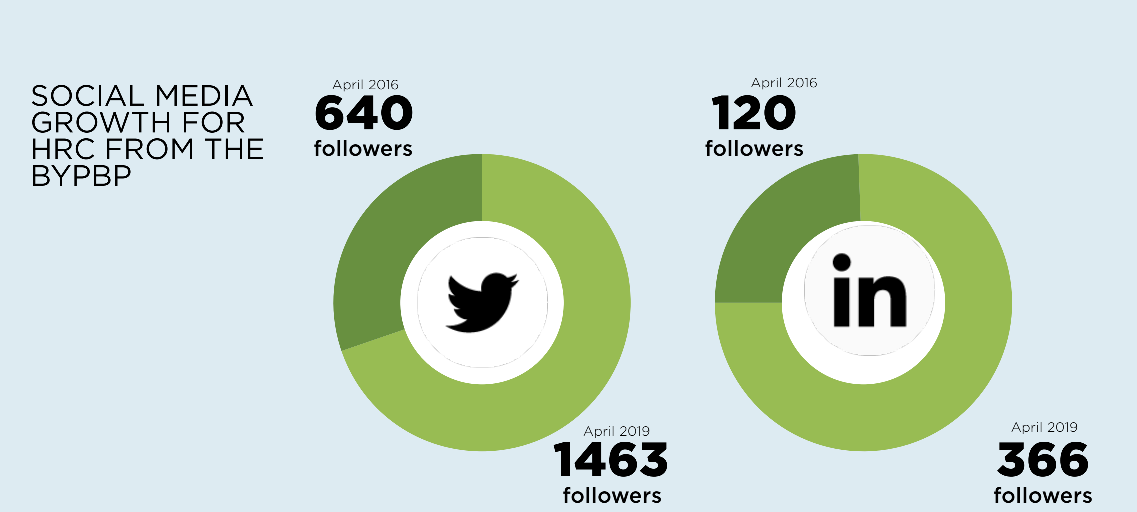
A 'build your personal brand' programme (the BYPBP) was designed to help our lawyers to do the following:

- Build their personal brand with one-on-one external PR support.
- Choose specialist subjects for which they'd like to be known.
- Use their strengths and attributes as springboards for personal brand development, letting individual personalities shine through.
- Test ideas with management's backing and support.

Focusing on individual differences and strengths, rather than being unduly prescriptive, fee earners provide the drive and

LPM FIRM FACTS

HRC Law (at time of entry)
Revenue: £1.75m
Corporate status: LLP
5 partners, 26 total staff
Office: Manchester



initiative and the BYPBP provides a support framework.

The BYPBP was tested in early 2018, then formally rolled out in April 2018. Three lawyers who used the initiative to develop their personal brands during this period serve as examples of how the three key objectives have been met.

Graham's brand development

Graham Hansen joined the firm in June 2017 as a commercial associate. Now 12 months on, he was keen to further develop his profile in areas such as GDPR. The BYPBP helped him focus on future growth. AI and blockchain are new focus areas for Graham.

His journey:

- Early 2018. A firm-wide marketing push on business GDPR-compliance with four 'products' (tasting, training, testing and tailoring), providing different levels of support based on clients' needs and budgets. This was coupled with internal and external training seminars and content production – including a webpage and 'toolkit'.
- Insight-sharing on GDPR from Graham in the wider media. Initially, this involved providing comments (for example, growth business, people management), and later, full articles (for example, TechRadar Plus)
- Insight-sharing and thought leadership on cybersecurity, blockchain and AI (for example, with Recruitment International). This included co-hosting a well-attended seminar on blockchain.
- Consolidating the firm's relationship with recruitment business network Northern Power Hive, including speaking at its event.
- Speaking at a recent Recruit event, co-hosted with NatWest.

Siobhan's brand development

Siobhan Howard-Palmer joined in February 2018 as an employment associate.

The BYPBP encouraged Siobhan to extend her fresh perspective on employment law marketing (for example, co-producing the lighthearted 'Hot response to current news') to a broader audience and showcase areas of expertise about which she is passionate.

Her journey:

- Engaging content on current topics across various media. These included a piece for International Women's Day, and a discussion with the Telegraph about job interview questions which could land an employer in court, and participating in a webchat on work-life balance for the Daily Telegraph
- Wider sharing (via social media, and the firm's newsletters) of the 'Hot response to current news' feature, which looks at employment issues in the news, drawing lessons in an approachable way.
- Showcasing her expertise in recruitment business employment law issues – for example, in People Management, and Recruitment International (co-written with Graham).
- Developing the firm's employment practice, including assisting with its submissions to the Personnel Today Awards 2018 and the Business Masters Awards 2019.
- Arranging and speaking at the firm's business protection seminars.

Laura's brand development

Laura Darnley was keen to revitalise the business immigration practice area that she'd begun to develop before her maternity leave. Brexit gave her the opportunity, via the BYPBP in 2019, to use media to explain how and why business immigration is important for companies, and how she can support them to remain compliant and competitive.

Her journey from January 2019:

- Thought leadership on business immigration issues connected to Brexit (for example, for HR Magazine).
- Arranging and speaking at the firm's Brexit seminars, business protection seminars, and at a recruit event co-hosted with NatWest.
- Showcasing knowledge on employment law issues (the Telegraph).

LEADERSHIP

Simon Whitehead, managing partner, was a driving force behind the initiative, supported by HRC Law's other partners. Communications agency Petal & Co provided external expertise and helped to shape the programme, keeping it structured yet flexible and simple.

Individual fee earners attended one-to-one meetings to develop their personal brand plan, distilling discussions into a one-page summary, and capturing individual strengths and attributes, desired outcomes, and methods and timelines for achieving these outcomes. Achievement of personal branding goals was left largely in fee earners' hands. The three lawyers above were particularly successful owing to their hard work, drive and ambition.

IMPACT

Return on an investment in people is a longer-term investment. The firm was not anticipating immediate growth, yet the results have been astonishing.

- The commercial department has seen dramatic growth (fee income increased in FY18/19 by over 70%). Graham has appointed a newly-qualified solicitor to support the new business which his efforts generated, and has also strengthened our existing relationship with Northern Power Hive.
- The employment department continues to grow (fee income increased in FY18/19 by 33%). The firm's profile has grown too; HRC Law was shortlisted at the Personnel Today Awards 2018 and at the Business Masters Awards 2019.
- Laura's business immigration practice has already worked with seven clients (three are new). More than £6k in fees were billed, and £10k of additional fees were quoted; these figures are particularly impressive as efforts only started in January 2019.
- Positive feedback from clients for Graham, Siobhan and Laura, and for other members of the team.
- Strong social media growth for the firm (see box above). LPM

PEOPLE AND ENGAGEMENT

LODDERS

Lodders' submission on 'Project Shine' – aligning the firm's people strategy to its corporate strategy

Lodders was founded over 230 years ago in Henley-in-Arden. Today, Lodders has four offices in Stratford-upon-Avon, Birmingham, Cheltenham and Henley-in-Arden, with 162 staff including 25 partners. Our drive to retain our culture, and the success of our recent initiatives, has led to a substantial increase in profits.

THE CHALLENGE

Since 2013, Lodders has achieved substantial year-on-year growth. It may sound clichéd, but our people have been fundamental to that success. However, with growth comes cultural challenges; new starters need to understand how we work and what makes us tick. The 'war for talent' at all levels has never been stronger, employment levels are higher than they have been for decades, and we have to work hard to convince potential employees that Stratford-on-Avon is indeed the best place for them to either kick off or develop their career. We have to fight the lure of Birmingham with a strong offering and a compelling culture that goes beyond being a 'lifestyle' employer.

So, to support our fast growth, we identified that our HR strategy and structure needed investment of both time and money to help deliver the corporate strategy of measured growth and excellent client service, and also to offer a rewarding and attractive career experience for Lodders' partners and employees.

In 2016 it was noted that we needed to commit to the

LPM FIRM FACTS

Lodders
Revenue: £12m
Corporate status: LLP
84 fee earners, 162 total staff
Offices: Birmingham, Stratford-upon-Avon, Henley-in-Arden, Cheltenham

We identified that our HR strategy and structure needed investment of both time and money to help deliver the corporate strategy of measured growth and excellent client service

alignment of our people development and 'Project Shine' was born.

THE PROGRAMME

In order to ensure the aims of Project Shine aligned with our corporate strategy, it was first important to codify the Lodders values. These values would then underpin both the corporate and HR strategy going forward.

We already had a strong sense of Lodders' values, but needed to clarify and formalise these thoughts so that we could share them with new partners and employees. We held focus groups across the firm to consult and gather opinions. After consulting with over 80% of our people, we established our values as: collaboration, excellence, sense of purpose, drive and diligence, fairness and openness.

The second stage of the project involved launching our first colleague opinion survey. This survey asked a multitude of questions on all areas affecting employee wellbeing – including happiness, productivity, sense of belonging, understanding of business goals and how to contribute. The results enabled us to define the key areas on which Project Shine needed to focus. These were identified as:

- Reward and recognition
- Recruitment, induction and retention
- Appraisals.

The use of focus groups to help shape the strategy proved extremely successful. They were held with focus groups held with over 70% of staff. The outputs led to a renewed appraisal and personal development review process that reflects the firm's values, staff competencies and future objectives and development. For example, a new induction process with the following elements was created:

- An onboarding toolkit
- A buddy system
- A personal letter from the managing partner
- Lunch invitations from other departments
- Access to online training prior to commencement
- Induction booklets providing insight into firm values.

A key part of the recruitment and retention aspect of the project also involved ramping up our focus on internal communications. We introduced a number of initiatives:

- Lodderpedia – our new intranet. Built in WordPress, and only accessible to those on the internal server, Lodderpedia has quickly become an online hub for firm-wide communication. It provides up-to-date policies and procedures, office manuals, company newsletters and updates, monthly reports from the managing partner, training videos and help sheets, a virtual suggestions box and an online noticeboard.
- An interactive 'temperature check'. This tool is used on a weekly basis for people to tell us how their week has been, on a scale of 1-10, with 10 being the highest mark.
- Internal recruitment and the introduction of 'refer a friend' led to a £75,000 reduction in recruitment costs in one year, and we no longer depend on agencies.

LEADERSHIP

A milestone moment for Project Shine was the recruitment of our HR director, Sarah Naffine, in January 2018. The role of HR director was a new one at Lodders. Sarah works closely with our managing partner, Paul Mourton, and has more than 20 years' experience in providing day-to-day HR support together with a strong track record of delivering strategic HR solutions. New initiatives introduced in the past 12 months include:

- An HR self-service database
- An applicant tracking software (ATS) recruitment system
- A revised benefits package
- Revised training and development packages with individual training plans
- The introduction of online compliance and data protection courses
- Free webinars for all and a new training room
- The introduction of apprenticeships
- The introduction of HR reps across the firm
- New mental health and wellbeing initiatives, including:
    - The introduction of mental health first aiders
    - Signing the 'mindful employer charter'
    - Stress management training for all staff
    - A free employee assistance plan (EAP) for all staff.
    - Free counselling for all staff and family members
- New initiatives for 2019 include:
    - Pick and mix contracts, including flexible working
    - An innovation hub.

IMPACT

Implementing Project Shine has already had numerous positive effects for Lodders, from saving in excess of £75,000 in recruitment fees, to reducing staff turnover and attracting a number of new hires. The change in approach, including revised promotional and bonus structures, has led to a number of staff returning to the firm – proving how special the Lodders culture, ethos and overall employee package has been.

The biggest impact has been seen in staff morale and wellbeing. Since launching our weekly temperature check we have seen the weekly average score increase from 5.69 to 8.22 in just over 12 months.

As mentioned above, an increase in staff engagement has also been a key indicator. We saw an 80% response rate for our colleague opinion survey, and an 83% engagement rate for our internal managing partner's report.

Our headcount has also increased from 131 to 152 in 18 months. LPM

HAROLD BENJAMIN

Harold Benjamin's submission on using LEM Verify – a tech to automate, speed up and mobile-enable AML checking

This submission is what we believe is a renaissance moment in anti-money laundering (AML)/identity checking for law firms. We believe the standard of identity checking will look like this in the future of the legal services market. We're the first UK law firm to implement this revolutionary solution into commercial use for a business. This innovative solution takes our anti-money laundering/identity-checking process from days to minutes.

THE CHALLENGE

For all clients, individuals or companies, in order to act on their instructions, a law firm must conduct an anti-money laundering/identity check. Often clients' instructions are urgent, particularly with regard to property transactions and disputes – AML clearance needs to be obtained prior to instructions being undertaken and can hold up lawyers acting on their client's instructions. Manually, this process can take days or possibly weeks, depending on the location of a client.

THE SOLUTION

LEM Verify is a pay-as-you-go-per-search system, where you send your client a link to the software, which they can open using a mobile device. The service takes the client through a process of facial recognition and OCR (reading the text from docs) to capture all critical information, it then passes that information to a verified third-party searcher to confirm an individual's identity – such as

LPM FIRM FACTS

Harold Benjamin
Revenue: £7.5m
Corporate status: Partnership
43 fee earners, 87 total staff
Offices: Harrow and West End

Equifax or Dow. The system ascertains 'liveness' of the client and checks the submitted documentation it uses speech and movement recognition ID innovation.

What sets LEM Verify's solution apart from its competitors is that the solution allows us to send our clients an email with a link on a tablet or smartphone, so that they can complete their identity check provided they have access to front and back-facing camera technology. They don't need to install an app. From our perspective, this is a major advantage for both us and the client; there's no requirement to physically attend our office, so it's a huge time saving for all involved in the process.

Historically in legal identification, there has been a reliance on the use of certified copies, which are often difficult to verify and also vulnerable to the possibility of tampering or fraud.

There's no doubt other firms that may have considered, or are considering, this solution or competitor technology to LEM Verify. However, the huge barrier of financial investment (£50k per year and a requirement to build an app) would be difficult for practices outside the largest of firms to justify providing for clients at this entry stage. We maintain that the LEM Verify option is far more commercially sensible as it applies a fee-per-search system.

We address the key dates in development below.

LEADERSHIP

In the summer of 2017, through one of our existing clients, we were introduced to Oliver Fattal, the innovator and joint founder of LEM Verify. He brought to our operations director Jamie Abrahams' attention a solution capable of achieving high-speed anti-money laundering/identity checking clearance for individuals and companies with minimal delay and administrative inconvenience to the client.

Jamie met and communicated with Oliver for 12 months – as Paul Laight, chief technology officer (CTO) and co-founder of LEM Verify and his team were developing the framework of the solution.

In October 2018, LEM Verify delivered a beta version of their software application for us to trial and test.

Between October and December 2018, Harold Benjamin obtained approval from compliance consultant Legal Eye, for the use of the technology for our anti-money laundering processes. We've also demonstrated the technology to Global Professional Risk Solutions (A division of Lockton Companies, our insurers).

In December 2018, our Harold Benjamin AML operations team were trained on how to use the system and deal with client queries and assistance.

Also in December 2018, training workshops were conducted throughout our fee earning teams to incorporate use of this new method of AML clearance for new client-opening instructions.

The use of LEM Verify has easily gained traction within the firm for obvious reasons. Process wise, the quicker new clients can be AML-checked and cleared, the quicker instructions can be completed and billed. Both fee earners and clients have taken to the solution like ducks to water. Most clients, once they have agreed to instruct us, want their instructions completed at pace and this service facilitates that objective, particularly as time is often of the essence in real estate and litigation matters.

IMPACT

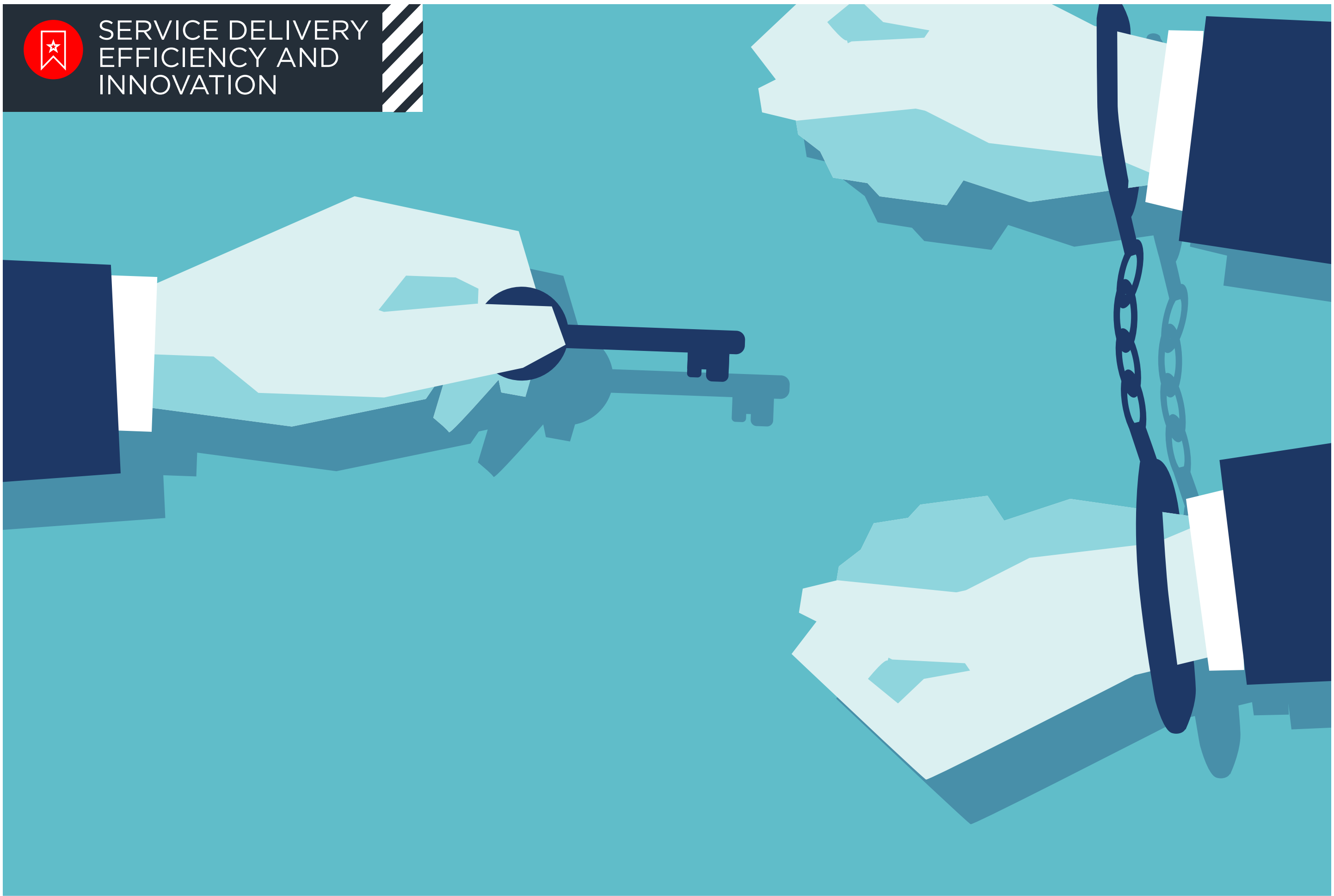
Our AML procedure has been reduced from a few days' turnaround into just a few minutes. This is a revolutionary technological achievement in client service delivery for this firm.

Previously, we used a number of disjointed, dated digital tools, which were market-dominated by large players that have proved considerably slow to innovate.

From a compliance and security perspective, it's important to emphasise that this innovation is very difficult to cheat with regard to fraud and cybercrime. The solution uses face-recognition technology to identify an individual and will not provide clearance until the identity is satisfied, be that physically or with documentary evidence.

We've now completed over 350 anti-money laundering checks with this software. LPM

SERVICE DELIVERY EFFICIENCY AND INNOVATION



GT STEWART

GT Stewart's submission on using Tikit FormShare automation to radically restructure police station client onboarding

Client onboarding is traditionally time-consuming and error-prone. So, starting in August 2018, GT Stewart began developing its own, more efficient, solution in the shape of a highly automated onboarding process using Tikit FormShare software. Following the successful launch of the software firmwide in January 2019, online forms are now completed digitally on a laptop at police stations. Thereafter, complete, accurate data is sent directly into the firm's practice management system where software automates the client inception process. This groundbreaking innovation means accurate client data is handled securely and compliantly.

Moreover, the time taken to onboard new clients is slashed. This is having such a profound impact on GT Stewart's operational efficiency that, at a time when other firms are contracting their criminal law practices, GT Stewart has been able to invest in redesigning the practice to save administrative costs and actually expand.

THE CHALLENGE

It takes a lot of administration to onboard criminal law clients, starting with manual form-filling at a police station, followed by the manual keying of information into the firm's database once a physical form is back at the office. The process is messy, time-consuming and therefore costly. As admin personnel struggle to decipher the handwriting of others, it's error prone. As pieces of paper pile up, it's insecure. And as the information might be incomplete, there's every chance of further delay, which can negatively impact on client experience. This is even before the data can be used to start creating new client and matter files manually. GT Stewart's challenge was simply to use Tikit FormShare software to streamline and automate as much of the work as possible in order to reduce costs and improve data security. Simultaneously, we wanted to create a process so simple, compliant and secure that even the most technophobic lawyer would instantly see the benefits and adopt it.

THE SOLUTION

Work began in June 2018 under the direction of GT Stewart's practice director Melanie Krudy. A project team was convened, including contracting

LPM FIRM FACTS

GT Stewart

Revenue: £7.5m

Corporate status: LLP

125 fee earners, 175 total staff

Offices: Birmingham, Leeds, London, Manchester, Kent

in expert advice for project and change management. GT Stewart inherited a prototype form created by a Tikit P4W User Group initiative in which the firm had participated, sharing the project resource of what would have been a prohibitively costly project among 14 firms. The project team's first task was to look at this form and decide how far they wanted to take it. They decided to develop a solution which would achieve the maximum possible process automation.

By November 2018 the solution was soft-launched in one GT Stewart office. Work was initiated on change management to ensure the new system was widely adopted and the firm invested in new, lightweight laptops to support its implementation. The new software had such a big impact that the firm had to undergo some restructuring. Training webinars were conducted in January 2019, and on 21 January the new system went live in all of the firm's UK offices.

Now a digital form, held on a laptop, is completed at police stations. This carefully structured, nine-page form ensures that data collection is accurate, complete and efficient, plus a time record is created. Information can be captured online or off and is instantly encrypted. Once submitted electronically to the firm, it goes directly into the firm's P4W practice management system where the software instantly:

- Checks for conflicts
- Executes a compliance check
- Opens a new client record where required
- Opens a new client file
- Time records the complex legal aid time and fixed fees.

Stage two of the project has been to streamline the client care and advice documentation generated from data captured in the form, which also initiates the automated billing process.

A court advocacy form will be rolled out in May 2019 with similar functionality.

This is the first project of its type to use Tikit Formshare nationally to export police station data directly into the firm's practice management system and automate processes therein, slashing the administrative overhead.

LEADERSHIP

GT Stewart director Melanie Krudy is a criminal lawyer. She steered the project, headed the project team, signed off on the project specification and scoping exercise, oversaw the evolution of the form and was ultimately responsible for its design and delivery. Harri Clement, practice supervisor at GT Stewart, was responsible for the technical realisation of the form, for testing it, and for ensuring it worked on the operational level both with clients and onsite at police stations for lawyers and other firm representatives.

IMPACT

This innovation is having a profound impact on GT Stewart's operational efficiency:

- The accuracy of data is improved
- GDPR compliance has built-in
- 35 minutes is saved per onboarded client
- 2000 police station clients onboarded in the 2018 financial year = projected total saving in 2019 of 1166 hours, 166 days of work, and roughly seven months
- GT Stewart is redesigning the team processing client onboarding, meaning they can be redeployed on higher value activities.

Finally, legal aid criminal law practices make a loss across the vast majority of work types, owing to the significant and relentless fee cuts made by the Ministry of Justice over the past 10 years. For GT Stewart to continue in its mission to practice criminal defence law – and with no other work to cross-charge – the firm had to find a way to cut costs. This it has done by embracing technology. Moreover, at a time when other firms are contracting their criminal law practices or closing them down, GT Stewart has actually been able to expand through a merger with FMW Law. In essence, the automation of police station onboarding, advocacy and case management using Tikit Formshare and P4W has provided a roadmap of innovation, by which the practice of criminal law can become economically viable for the firm. LPM

SERVICE DELIVERY EFFICIENCY AND INNOVATION

CFG LAW

CFG Law's submission about its client-first service, which sees its team pull together with injured people and their families to get their lives back on track after a serious injury

CFG provides an all-round service focused on the needs and goals of seriously injured clients and their families, as identified by our continuous research. We developed the 'client-first service', which is a client-focused service built from the ground up around the injured person and their family. This service goes beyond providing legal advice and encompasses complementary non-legal services, including financial, physical and emotional support. This has resulted in better outcomes for clients, helping with their overall wellbeing and future outcomes, alongside quicker settlements of their compensation claims.

THE CHALLENGE

Working closely with seriously injured people and their families, we identified numerous gaps in their needs that were not being met by the traditional legal sector, nor health and social care. We recognised that we could help fill these gaps and achieve better outcomes in terms of their recovery and wellbeing with a holistic service.

THE SOLUTION

Our strategy is to influence change in the serious and catastrophic legal and associated sectors. This requires innovative working partnerships and service solutions. From the research, aligned to strategic intent, we established the client-first service solution. This is a full wrap-around service, built from the ground up around the needs and wellbeing of the client and their family, establishing their goals from day one.

Key components include:

- Additional rehabilitation, support and wellbeing plans – separate from our litigation plans. These plans are illustrated opposite.
- CFG early funding – for support and rehabilitation to improve outcomes immediately before interim payments.
- Client support managers – we employ healthcare professionals (HCPs) who provide complete support across all areas of care, family requirements and local stakeholder liaison.
- Supporting families – including the provision of

LPM FIRM FACTS

CFG Law
Revenue: £4.5m
Corporate status: Ltd
47 fee earners, 71 total staff
Offices: Cheadle, Manchester

travel, therapy and counselling to address emotional needs and support all family members.
• Discharge planning – liaison with key stakeholders to establish discharge plans, including rehabilitation and support.
• Community integration – the immediate needs of the individual and their family when they are back in the community.
• Legal project management – to provide excellent services to our clients which centre around proactively evaluating, planning, budgeting, managing resources and ultimately delivering each case.

Litigation plans (above) cover all aspects of the legal claim, providing excellence in areas of the claims process. These provide a clear and consistent approach to all cases and improve client care standards.

Rehabilitation, support and wellbeing plans (above) offer a full wraparound service of support. This is a proactive approach, identifying needs and helping clients and their families who find themselves in unexpected and difficult situations.

We've based the client-first service on Maslow's hierarchy of needs. We look at all the different areas where we can contribute and help. The aim is to support clients and their families from the physiological level when the life-changing event occurs, aiming to moving them towards the top of the pyramid.

LEADERSHIP

The client-first service was developed by a steering group over several months and is an ever-evolving service, which moves with the needs and goals of our clients and their families.

The steering group consists of senior-level partners across several different roles, encompassing a broad scope of experience and expertise, including head of serious and catastrophic injury, head of client innovation, head of commercial operations, and head of business risk and compliance.

This steering group agreed upon the components of the client-first service, using the principles of legal project management (LPM) to construct our plans to be applied to all cases. Once developed, firm-wide sessions were arranged to provide in-depth training and worksheets for all colleagues (not just fee earners) to illustrate the elements and emphasise what comprises the service. Everyone in the business contributes to our delivery of this service.

THE IMPACT

The benefits have been:
• Quicker access to specialist treatment and rehabilitation.
• Better outcomes for clients and their families.
• Enables us to work intensively and proactively on cases to achieve settlements and the best possible outcome for the client without unnecessary delay.
• Evidence to date is that in many complex cases we can halve the case duration with no detrimental impact on the funding clients receive for lifelong care.

The service means we settle cases significantly quicker than competitors. For our business, this means that we may experience reduced income and profits in the short term, but our strategy is focused on building a long-term business whose aim is helping those affected by injury – together. By settling cases without unnecessary delay, with the right support, clients achieve better outcomes in terms of long-term prognosis, and we have resources available to help more clients. This provides long-term sustainable growth.

Ultimately, as in all organisations, there's a decision to be made about what to do with profit. The success of our client-first service approach is that we use profit to invest in colleagues' futures and research to continually refine our service, rather than increase profit distribution to partners.

By developing and implementing the client-first service, we're progressing towards achieving our strategic intent of influencing change in the serious and catastrophic legal and associated sectors. LPM

CASE STUDIES

Case one
• T12 spinal cord injury
• Client support managers assisted coordinating transfer to specialist spinal injury unit.
• Upon discharge, implemented comprehensive rehabilitation and support plan.
• Community-focused care package arranged, which facilitated participation in pre-accident adrenaline sports/hobbies.
• Settled in May 2018 for £5.3m. Agreed two years after the accident date – quicker settlement than industry norm of 4-6 years.

Case two
• Catastrophic injuries including a C5 spinal-cord injury and traumatic brain injury.
• Secured immediate care support and interim payments.
• Improved communication between them and the family by funding a mobile phone and travel, tackling L.M.'s isolation/depression.
• Client support manager assisted with discharge to an adapted bungalow, financial and benefits assistance.
• Settled in February 2019 for £6.5m. Agreed just over two years after instruction – again a quicker settlement than industry norm.

Case three
• Traumatic brain injury requiring complex needs post-accident.
• Liability remained denied and insurers refused to release interim funds.
• Instrumental in discharge, ensuring the correct care home was in place.
• Represented the family after continuing healthcare funding removal and led the appeal.
• Supported client's wife by arranging assessments and counselling to help her come to terms with the situation.
• Settled in June 2018 for £2m, funding lifelong care.