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What will become of us?



A TALE OF 2020



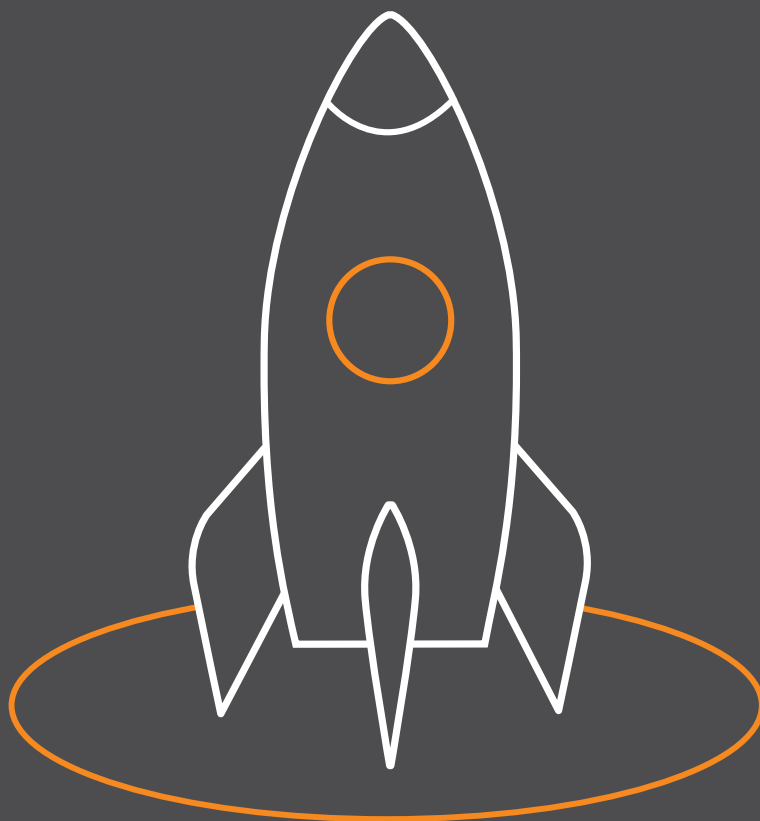
*The continuing narrative of SME law firms - will they
be frightened by the ghost of their past, and can they
present a business case for the future?*

HRAGONY AUNT

*People guru Polly Jeanneret
on HR horrors from 2019*

LPM INSIGHTS

*Polling results are in from
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Wow, 'tis that time of the year already! I don't know about you but November was really go, go, go. Excited to start settling into the festive season, wrapping up the chaos and fun of the year just gone, and plan to do it all again, but better, next year.

This issue we're absorbing all that we've seen happen in the legal sector over the years and digesting their lessons to produce some, hopefully helpful, insights about what's to come. Join Josh Adcock on page 18 as he tells the tale of the ghosts of SME law firms past, present and future.

For those of you who may be more statistically-inclined, we've got some qualitative research – in the same vein – that you might vibe with. I analyse the polling results collected across this year's LPM conferences in London, Bristol and Leeds (p27). Read about recent market trends as polled and told by your peers.

Want to be part of shaping our research next year? LPM conferences 2020 will be here sooner than you think. Join us at LPM South in London on 10 February or LPM North in Manchester on 23-24 March. For more info and to book, go to: www.lpmmag.co.uk/events. LPM Practice Excellence Awards 2020 entries are now closed and currently being judged! The winners will be announced at LPM South – hope to see you all there! In the meantime, have a happy holiday and new year!

Kayli Olson, editor
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CAPITAL MINDS**

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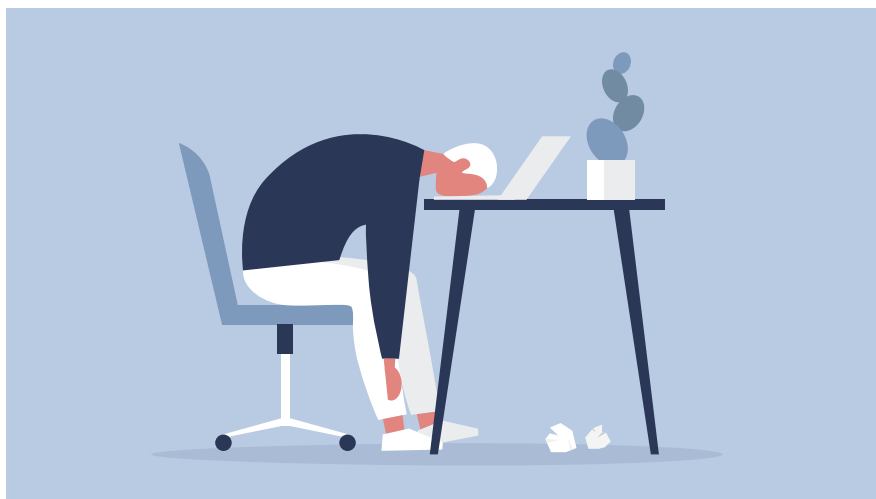
LPM's people guru Polly Jeanneret discusses some of the major HR stories in legal from 2019

There's nothing like Christmas, when the pressure for the perfect pine-scented tree reaches its zenith and raises stress levels. Nor is there anything quite like the legal profession for inducing burnout and anxiety, it seems. Stress and wellbeing have been a constant theme in 2019. I have done a brief survey of all the surveys on the subject and can confidently conclude that 100% of lawyers are stressed out 100% of the time. Okay, so I exaggerate, but it's definitely a problem. Lawyers are regularly coming near the top of those in jobs most likely to lead to mental health problems.

Common themes (from junior and senior alike) are too much work (that is also too complex for one person to shoulder) and not enough managerial support. We have seen a number of solicitors' disciplinary tribunal cases (such as Sovani James and Emily Scott) where quite young lawyers have cited overwork as a contributing factor in them feeling compelled to fake letters, falsify attendance notes and the like – note that the high court recently decided that in disciplinary cases overwork did not excuse dishonesty.

Some combat solutions have also hit the headlines this year: LawCare, the mental health charity for the profession, appointed some wellbeing 'champions' (including a senior partner at Linklaters) to spread the word on greater openness in firms, or initiatives such as 'bring your dog to work days' (personally, I would find having a dog to look after at work would be incredibly stressful in itself so clearly that's not the right thing for me).

Or there's the Mindful Business Charter, co-authored by Addleshaw Goddard, Pinsent Masons and Barclays, which has 22 principles to improve stress levels, including respecting people's annual leave and, my two favourites: not using 'cc' in emails and a rule that anyone who sends an email after hours should make it clear they do not expect an immediate answer. You



know who you are.

Barrister strikes and a smattering of social media related gaffs have also made an appearance this year, as has further fallout from MeToo. Most recently and most notably was a case brought by the regulator and heard in October against a Freshfields partner who, the SDT found, had engaged in sexual activity with an intoxicated junior female colleague. It made for painful reading. Earlier in the year, in May, the International Bar Association published a massive global survey of lawyers that revealed troubling stories of sexual harassment woe. Perhaps the most interesting element of the report was that researchers identified specific law firm characteristics that "increase the likelihood of negative workplace behaviours." They were: "Where leadership is male-dominated ... where the power structure is hierarchical, where lower-level employees are largely dependent on superiors for advancement, and where power is highly concentrated in a single person." So a bit like Father Christmas and his elves then? **LPM**



We have seen a number of solicitors' disciplinary tribunal cases where quite young lawyers have cited overwork as a contributing factor in them feeling compelled to fake letters, falsify attendance notes and the like

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Having a clear strategic plan that places the IT project as an essential component of the firm's success is a vital starting point



Time to face the change

STEVEN TREHARNE, FORMER MANAGING PARTNER

David Bowie once sang about changes in 1971: "Time may change me, but I can't trace time." Why the trip down memory lane and a nostalgic nod to the 70s?

In previous articles, I have espoused the virtues of a strategic plan to enhance IT capabilities of law firms, aligned to changing customer buying and shopping habits, their (and our) expectations of service delivery and the massive challenge of delivering legal services that match or even exceed the expectations of the Amazon generation. Change is happening and it's happening very fast. It's my view that we don't have the luxury of waiting for "time to change me."

Negativity towards the 'C' word is the most common inhibitor to the successful introduction of IT efficiency and improvement projects. There can be a reluctance to embrace and change working practices with the view that time runs away and faith is lost in the project. To kickstart change, there needs to be much more than a "take a chance on me" mantra.

Having a clear strategic plan that places the IT project as an essential component of the firm's success is a vital starting point. Obtaining buy-in from partners and other internal stakeholders is also imperative. I don't mean merely head nodding in meetings or acquiescence but active and proactive support. Prioritising a project that will maximise the benefits to the firm is the next step. Follow this by ensuring that the project has a number of distinct but discreet phases as this helps to provide evidence to the leadership team, partners and the firm as a whole that the project is progressing, on time, and to budget.

An error I have made previously is underestimating the level of resource required to deliver a project. Relying on the goodwill, loyalty and strong work ethic of a few individuals keeps costs down but puts unfair pressure on those individuals and causes slow pinch points in the

delivery process. Slow implementation loses momentum and faith in the end product and fuels the anti-change lobbyists who maintain the 'I knew it wouldn't work' mentality.

I understand that budgets are tight, and the retention of margins is important, but it's worth looking at external change management experts who can relieve some of the internal burden and keep the project on track. I know that the larger firms such as Osborne Clarke, Burges Salmon, VWV, and Womble Bond Dickinson do this, even with their large internal IT and centralised resources. Also, give some thought to the ebb and flow of work volume and the different skills needed across the project lifecycle. Can external specialists help? Programme governance can impede the pace of delivery. Consider what the 'right amount of governance' is for your firm. Too much will strangle the project while too little will abdicate responsibility and accountability and visibly eradicate the level of leadership support. The programme governance must be flexible and adaptable while making timely decisions, with a degree of tolerance for cost and quality. They must also "trace time." This is not an easy task.

When the not inconsiderable tasks mentioned above have been achieved, the project must be rolled out across the firm. "Business readiness planning should run parallel to the technical planning. A well-executed multilayered business readiness workstream, including communications, engagement ... and training enhances user adoption rates and accelerates time to acceptance," to reference IT Project Acceleration for Law Firms 2019 report by Nine Feet Tall. For us, this is the critical part, as it is when the benefits kick in of better client service, improved efficiencies and a competitive edge, which must translate to the bottom line. Are you prepared to deal with the "ch-ch-changes"? Article written November 2019. **LPM**

LPM FIRM FACTS

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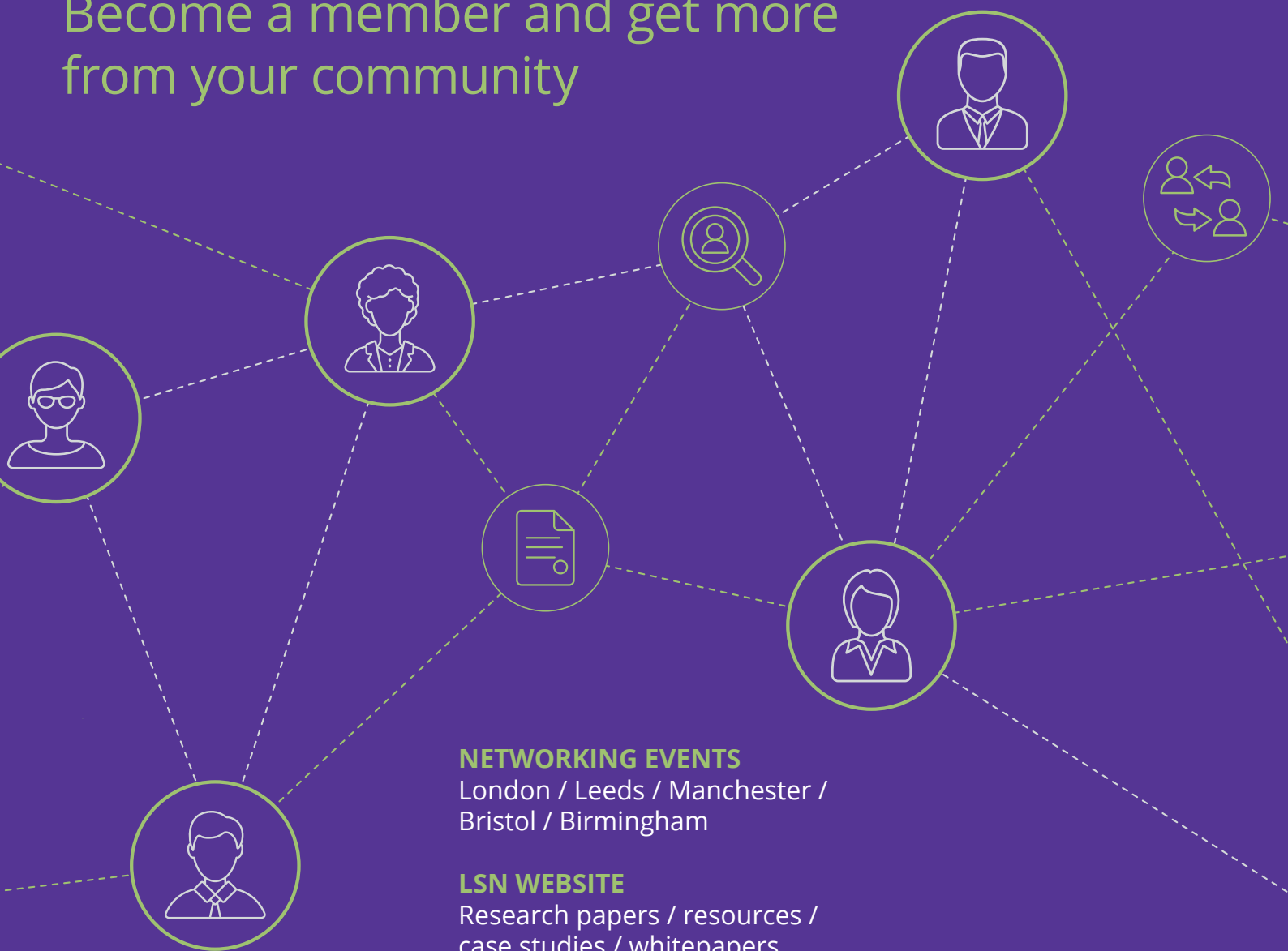
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If one of your visitors takes the time to complete any of your web forms with a view to engaging your services, what do you do next?



Linked up

SCOTT BROWN, THE MEDIA MIND

When was the last time you stopped and thought seriously about your practice management system (PMS) and what it could do – or needs to do – to improve your firm's ongoing business intel or efficiency?

Let's consider a key area of spend within the marketing budget – pay per click. The few firms adopting this marketing approach have very little tangible evidence of what the actual return on investment is. The simple reason behind this is that many firms – not all, I hasten to add – take the time to track inbound leads and their source of acquisition, let alone then measure the volume and ultimate conversion rate once manual intervention in the office happens. Then, of course, there's the question of how much revenue that lead generated? This can all be autonomously tracked by your PMS.

Next, think about all the leads generated by your website. How much do you know about them and what added value could this information carry? This is another great example of potential missed opportunity. That valuable follow up action can allow you to cross sell your services – it's easier to sell to a known lead than an uninformed cold call. Wouldn't you like to know what your audience has engaged with and is interested in? This can all be automated by your PMS as well.

Then, if one of your visitors takes the time to complete any of your web forms with a view to engaging your services, what do you do next? My guess is that you probably receive an inbound email notifying you of the enquiry and then have to record the details manually – keying all the details into your PMS, for example – and then someone sends an email to acknowledge receipt of the enquiry. Surely if this could all happen behind the scenes and the process was automated it would save hours of admin time? This kind of simple automation starts to reduce human error and

mismanagement of sensitive data. And it provides greater peace of mind with the knowledge that a good piece of your client onboarding process is taken care of. Again, this can all be automated directly into and via your PMS.

These are just a few examples of what you could consider as simple hygiene factors when it comes to website/PMS integration, and all of which are now achievable if you look around or talk to your IT/marketing providers or colleagues. These are the things that can make or break your competitive edge, giving you that vital information for a head start.

Not restricted to the above, there's a lot more you should also consider.

Driving accurate and meaningful data directly to your PMS means you can now also get valuable marketing reports and statistics quickly at your fingertips. With this information, your direct marketing activities should become far more targeted and meaningful to your recipients, encouraging more cross selling and in turn more business – you now have campaigns that can be followed up and measured.

Aside from your website, mobile apps also play a part in this data-driven PMS-centric environment and I would encourage all law firms to adopt their own app. Having your brand in front of your clients all the time carries obvious benefits and can allow you to make your client experience even more personal and data rich – and GDPR compliant. This is obviously an extension of your website and can also utilise some of the aforementioned topics. Apps are fast becoming a powerful marketing tool, not to mention the direct communication benefits that they have to offer for your clients. And they're becoming key features in our future. Ignore them at your peril as others won't. They're set to be another very attractive shop window. **LPM**

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A good case management system will improve efficiencies at your firm – this in turn gives your fee earners more time so they can work with even more clients



Embrace for impact

DARREN GOWER, THE TECH GURU

2020 is the year your law firm finally embraces the power of technology – by introducing a case management system (CMS) into your practice.

The UK legal industry is considered one of the world leaders in adopting digital solutions. Nevertheless, there are still hundreds of firms throughout the country that are operating in a more traditional way. And they're suffering as a result.

New technology often means big change. And many are still sceptical about investing money into new systems when they believe things to be just fine the way they are. But 2020 is going to be the year the decision-makers stop hesitating and finally embrace more modern solutions.

There are three reasons for this. First of all, a good case management system will improve efficiencies at your firm – this in turn gives your fee earners more time so they can work with even more clients. And that, as you would expect, leads to a boost in revenues.

Automation is a key feature of legal technology solutions. Hours and hours of paperwork can be reduced down to minutes – it's good for the fee earner, the client and the firm, and it really is that simple.

The second reason is that technologies like CMS are a great way of improving your customer care. Cases get handled faster, with

less hassle, and this generally provides the client with a more positive experience. They're much more likely to seek your services again – should they need them – if they're confident you'll prioritise their needs.

Finally, you should use 2020 as the start of your digital evolution because if you don't, you're going to get left behind by your competitors. Thousands of law firms throughout the UK have embraced technology and are reaping the benefits as we speak.

They've taken the plunge and invested in case management platforms. They're providing a better service than they were before, and generating new business through a string of efficiency solutions. They're popular with clients because they clearly care about customer satisfaction.

Technology is advancing at a faster rate than ever before. New, innovative software being introduced to the market today will be even further advanced in five years' time. It will be far easier and more cost-effective to start introducing those systems now, rather than trying to do so at a later date.

Delaying the inevitable will only make things more complicated. If you haven't yet experienced how technology can play an essential role in legal services, then 2020 should be the year you make it your number one priority. **LPM**

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The majority of practices are going to focus more on client relationship management and the client experience



2020 vision

NATASHA RAWLEY, THE FILE QUEEN

Hello LPM readers. So here we are the final column of 2019. The Christmas feeling is already upon us, and all eyes are looking towards 2020 and what it holds! Approaching the end of the year not only encourages us all to assess the past but also pushes thoughts towards the changes that the coming year will require.

2019 has been the year of preparation for transformation with our clients in the legal sector. Now, more than ever, the demands on this sector are changing, and the need for planning and future-proofing is predominant in all practices.

What is the 2020 vision for law firms? We asked some of our clients where they were going to focus on innovation and change in 2020, and here's the feedback we received.

The majority of practices are going to focus more on client relationship management and the client experience. Gone are the days where clients are willing to wait for snail mail paperwork and delayed feedback; many practices are now engaging with electronic mailrooms and digital transformation processes to keep up with client demands and significantly increase their client experience. The introduction of the electronic mailroom and digital processes not only increases the workflow process, saving time and money, but also enables fee earners to engage more with the client, with superior and rapid access to case and matter files.

IT security is becoming a greater fear and threat to business practice; sadly, many businesses experienced viruses, system

lockdowns and ransomware situations in 2019. We have witnessed more law firms not only increase their security around their IT system but also outsource as much of the business continuity process as they can to be fully prepared against these threats. Disaster recovery plans are no longer about natural dangers, but about IT threats from within and outside the practice. Many practices that thought they had exceptional business continuity plans in place have suffered and are now bringing in the experts to assist.

Firms are also now feeling increasing pressure to attract the talent of the future. Your legal practice name alone will no longer bring a bustle of expertise through the door. The next generation is looking for dynamic and flexible work environments that provide solutions that allow them to be adaptable. One of the most significant areas of change we have seen here in 2019 is the push towards remote working. New, talented fee earners expect to be able to thrive in their roles from remote locations that suit them, moving away from long commutes. How ready is your practice for these new demands? Are your platforms digital enough to support this change? Do you have a fully digital HR platform in place? A digital HR platform will not only help these demands but also allow your HR department to increase efficiencies and cost savings, meaning that all of your team can be managed remotely as well.

If you would like further information or some support with any of the above solutions, you can contact the OASIS Group Team <https://www.oasisgroup.com/> **LPM**

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Clients now take it as given that their law firm will have access to the latest technology to increase efficiencies and reduce costs for the end user



Future proofs

KATE ARNOTT, THE NUMBER CRUNCHER

What does the future have in store for SME law firms? A changing marketplace driven by globalisation, technological innovation and automation, as well as a more flexible workforce that demands a better work-life balance, are all shifting law firms away from traditional business models.

We're also seeing niche practices entering the market, alongside changes in the way clients buy services, moving away from paying fees on an hourly basis in favour of fixed fees or other, more cost-effective solutions.

All of these developments are overshadowed by the continued uncertainty over Brexit and the current political climate. We're finding that increased international work and the opening of offices overseas are currently huge drivers of growth and profitability of many law firms, with both large and smaller firms seeking to capitalise on a globalised economy. Most firms have a cautious outlook for the next 12 months, but this is a prime time to ensure your firm is as future-proofed as possible.

Technology is key. In order to survive, it's vital that law firms invest in technology. Clients now take it as given that their law firm will have access to the latest technology to increase efficiencies and reduce costs for the end user.

With new rules governing the industry from November, technology needs to ensure full compliance and provide the flexibility to adapt in future. Law firms should be considering which technology is right to invest in and also giving consideration as to the best way to fund this.

Cybersecurity continues to be a significant issue for all law firms and the technology you

invest in needs to provide adequate protection today and against future threats. Your workforce also needs to understand the systems you have in place and it is crucial that they are aware of, and fully understand, your disaster recovery plan; and yes, you absolutely should have a disaster recovery plan!

While succession plans to identify and retain the future leaders of your firm are crucial, it should be remembered that it is also important to ensure there is succession and stability in support functions as well. Firms with strong back office teams and systems will be best placed to adapt quickly and thrive when facing any upcoming legislative changes.

Talent retention programmes should also be reviewed regularly as complacency can quickly lead to your top talent becoming demotivated. Good communication, a clear progression plan and the right culture can make the difference to whether or not your future leaders are leading your firm or a competitor's.

The call to action? Our advice would be to take the time now to review current systems and implement changes ahead of time, invest in the right technology and the right staff, and ensure you have access to the right funding to allow you to be flexible and agile when decisions need to be made quickly.

Undertake a health check of where your firm sits currently to identify the best steps to future-proof your firm.

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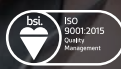


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Collaboration may have become a bit of a business buzzword in recent years, but the need to work more closely with colleagues and clients – often in different locations – has never been greater



Collaboration app-titude

NICK HAYNE, THE DATA MASTER

Collaboration may have become a bit of a business buzzword in recent years, but the need to work more closely with colleagues and clients – often in different locations – has never been greater.

Over 30 years of managed service experience has seen our technical teams specify, install, support and maintain just about every known software application to achieve almost every outcome, but some stand out as more useful to the modern law firm than others.

1 Microsoft Teams – a cloud-based team collaboration software, offering business messaging, calling, video meetings and file sharing. It enables local and remote workers to collaborate on content in real-time with almost any device. As a chat-based workspace, it features group and private messaging, with threaded and persistent conversations. Users create different channels to organise their communications by topic, connecting a couple of users in the office or thousands across global locations. The guest-access feature allows people outside an organisation to join internal channels for messaging, meetings and file sharing. This facilitates business-to-business project management to bring organisations and their clients closer in a safe and secure environment.

2 Trello – a collaborative project management tool that organises a user's projects into visual boards, quickly showing what is currently being worked on, who is working on what project and what percentage of the project is complete. You can set up multiple boards to give each client their own. And you can create lists of the tasks to be undertaken on cards, which hold all the relevant details, like who is responsible for each action, the deadlines and so on. And you can invite your clients to view tasks, so they can check on progress when it suits them, which can save a lot of time answering calls and emails.

3 Zoom – Zoom is an easy-to-use video communications platform with a reliable

cloud performance. It allows users to call each other from any location with video or audio calls, knowing each call can easily be recorded for future listening as well. Whether used for collaborating on projects internally or having live conference calls with a number of external contacts in different locations at the same time, it provides an array of solutions for law firms, including meetings with clients, opposing counsel, remote testimony and even virtual mediation.

4 Citrix ShareFile – allows organisations to securely store, share and sync their data without restrictions, seamlessly connecting to all content repositories. Secure access to files and folders stored on legacy systems, with third parties or just about anywhere else, removes the need for data migration. Customisable workflows and Office 365 integration deliver the ability to automate approvals, feedback and any document-based processes, including real-time co-editing and versioning, all controlled directly from the ShareFile account. It allows firms to create a portal that lets clients upload and download documents safely without the worry of email attachment limits.

5 Microsoft SharePoint – Each matter ensures law firms create vast amounts of information, but the knowledge within the firm increases too. A competitive advantage is on offer to the firms able to more effectively manage this data, information, knowledge and intellectual capital, which is SharePoint's strength. SharePoint is a knowledge management solution that stores it in a way that ensures the collective knowledge is usable and easily shared, typically through an intuitive portal, designed to become the hub of the digital workplace.

And finally, if you're interested in learning more about any of these applications and what efficiencies they can deliver for your firm, please get in touch and we'll fire up our innovation suite to demonstrate your future. **LPM**

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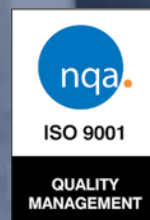


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A tale of 2020

SME law firms need not fear the future of legal services. Josh Adcock investigates the challenges and growth the sector has seen over the last 10 years, and hears some messages of what's to come

It was the best of times, it was the worst of times; it was the age of wisdom, it was the age of foolishness; it was the era of market expansion; it was the era of consolidation. The legal landscape has faced many challenges and opportunities over the last ten years or so, and now SME law firms stand at the precipice of a new decade. What have they been up to? As we stride into the 2020s, we take a look at some of the biggest challenges, and whether the dangers and promises of the last decade had (to mix up our Dickens stories) "more of gravity than of grave" about them.

THE GHOST OF LAW FIRMS PAST

Of course, no business operates in a vacuum – macro-economic factors have had unavoidable impacts on law firms in the last decade, including the knock-on effects of the global recession, which began to take hold between 2007 and 2009. More recently, three years of Brexit-related uncertainties have weighed on the UK economy, says consultant Tony Williams. "It's clearly having an impact on both the commercial and residential property sectors."

At the same time, SME firms have faced competition from larger firms, which are able to leverage their scale and resources to reach down into the SME market space. "Many larger firms now run low-cost process centres, which can be very efficient and very cost-effective."

When combined with salary inflation and increased IT and cybersecurity costs, the result, Williams says, has been consolidation in the market. "All the figures suggest that the 200 biggest firms are soaking up an ever-larger share of the legal market each year."

Regulatory changes, including the 2017 anti-money laundering requirements, have also placed a disproportionate burden on smaller firms, he adds.

Richard Clark, CEO at CFG Law, agrees, and says that the 2013 Jackson reforms, when combined with the economic downturn at the close of the last decade, have really challenged firms operating in that space. "Where cost budgets have to be

approved by judges, firms have had to be much more efficient in their operating practices. The old days of law firms charging by hourly rates and never really being questioned are gone – in reality, they were over in 2009 for corporate firms as the recession took effect."

When compounded with new Solicitor Regulation Authority (SRA) pricing transparency rules, clients have become more price aware. Those altered expectations have been noted by Eve Jarrett, founder and legal director at Pure Business Law, as well. "Clients will phone up now, get a quote, then go to other firms before they make a decision."

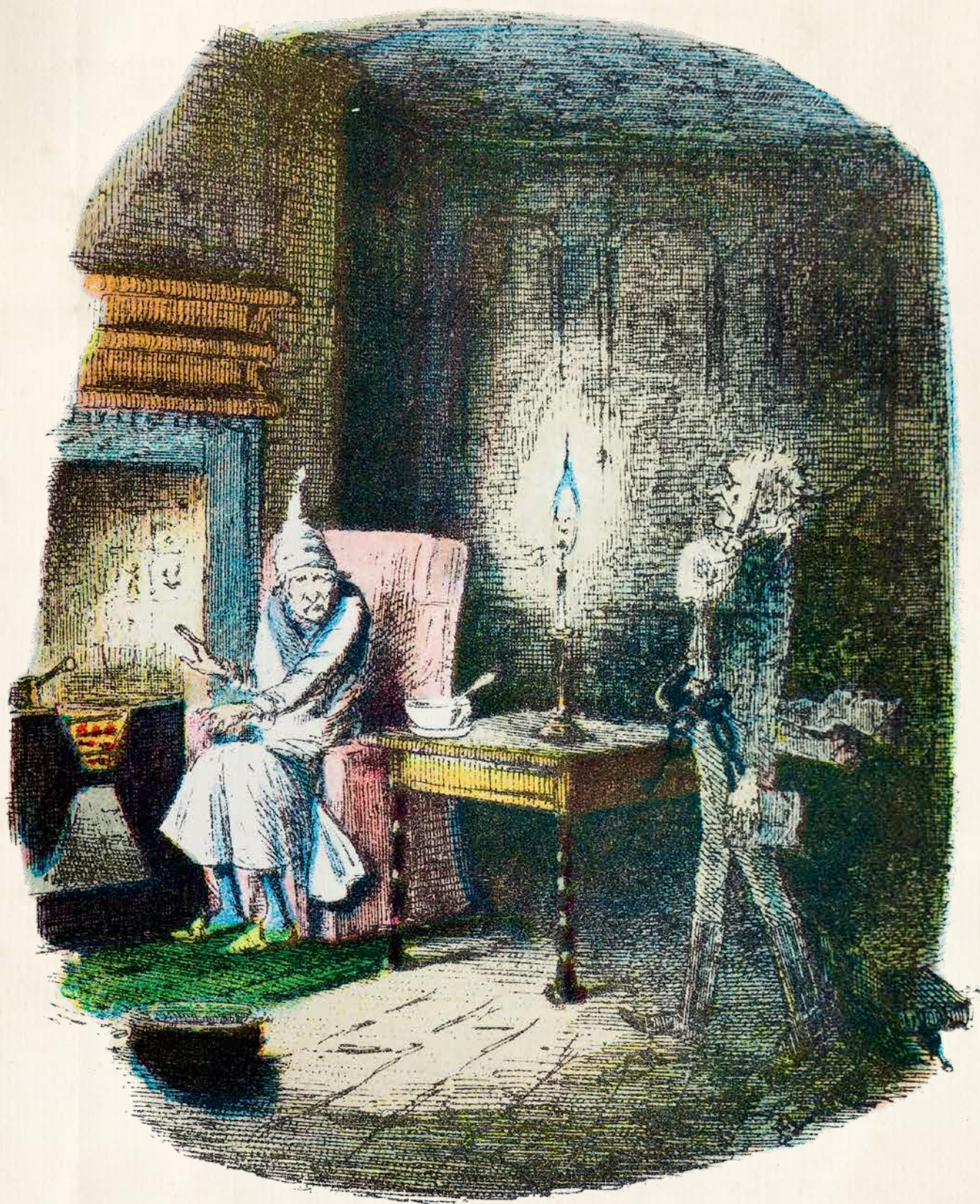
Partly, she says, this trend is down to the use of alternative legal service providers, which have sprung up in the past five years, competing for a share of the market. "We've seen more client usage of businesses like Simply-Docs and Rocket Lawyer. They're not law firms, but they provide legal services, like contract templates. Their presence will increasingly make shopping around by clients the norm."

THEY ARE WHAT THEY ARE

That's plenty of issues to respond to – so how have firms grappled with them? Changes in the environment and economic pressures have made it impossible to be all things to all people, says Ed Turner, managing partner at Taylor Vinters. "We used to have that luxury – but now we need to be very clear and focused about who we are and who we work with."

Taylor Vinters' client base, he says, is now primarily innovators and entrepreneurs. "That's meant aligning our brand and infrastructure to be relevant and able to service the needs of that client group. We recently opened an office in Oxford; in 2010 we launched in London; and alongside the original Cambridge office we now have a presence in the three largest centres for venture capital funding in the UK."

Similarly, Clark says that CFG Law's response to the reduced viability of personal injury (PI) cases



The old days of law firms charging by hourly rates and never really being questioned are gone – in reality, they were over in 2009 for corporate firms as the recession took effect

Richard Clark, CEO, CFG Law



Firms have to recognise that the people who leave aren't traitors – they should be encouraged to leave as ambassadors for the firm

Tony Williams, consultant, Jomati Consultants

was to shift the entire focus of its business model. “We moved from standard costs PI cases to more complex, catastrophic, life-changing injury matters. We deal with much lower volumes, but higher-value cases.”

At Pure Business Law, Jarrett says her firm's counterstrategy has been to offer more bespoke support and pricing certainty to clients; the firm offers fixed-fee pricing plans in addition to optional hourly rates. It has also, however, begun looking at beating the competition at their own game. “We're designing a website portal, from which you can download and complete contracts before sending them to us for review. This will ensure the client's unique context is taken into account. It will offer the same benefits as the competition but will offer the ‘insurance policy’ of having a solicitor also review it.”

Southampton-based full-service firm Paris Smith, which continues to service both business and private clients, has nevertheless shifted to become more focused on a core purpose and target client demographic. Managing partner Peter Taylor says in the past the firm had worked in areas, such as PI, which are no longer consistent with the firm's business model. Instead, it has chosen to support clients in growing areas, including technology businesses, and has responded to the local economy. “We have the benefit of having clients engaged in both high-tech digital areas and the global gateway of Southampton as well as the marine environment, which we are increasingly focusing on.”

THE GHOST OF LAW FIRMS PRESENT

So, what about the opportunities and improvements? Perhaps one of the biggest changes to the legal landscape has been the possibilities opened up by the 2007 Legal

Services Act. Although the Act came into force in the preceding decade, alternative business structure (ABS) licences were first issued in 2012 – the Co-operative Group being a notable entrant to the market. But have existing SME law firms grasped the opportunities of becoming an ABS, or making other structural changes? Tony Williams doesn't feel many have: “I've been quite surprised – I thought we might see more law firms coming together with small accountancy firms, small commercial agents, and other professional services, to at least share operating costs and facilities. We haven't seen much of that.”

There are, however, firms out there that have grasped the nettle. At ESP Law, CEO Peter Byrne says that the firm would not exist without the 2007 Act. As part of ESPHR group, first set up in 2003, the law firm operates alongside an HR consultancy business to essentially replicate the set of services that clients had already been assembling themselves with a variety of different suppliers. “We always ran our non-regulated advisory business like a law firm in terms of operational procedures, best practice and the type of people that we employed. As soon as we started to digest the Legal Services Act and the opportunities it presented, it was a natural next step to create an SRA-regulated legal business within the group. So, we obtained an ABS license in 2014.”

A crucial component of the business's strategy, however, is the type of talent it hires. “We don't operate a traditional law firm ‘pyramid model’ – we're completely flat.”

Byrne says the firm only employs legal talent with 10-years' PQE, both because it wants experienced lawyers but, also, because other firms are unable to offer the flexibility they want. “We've embraced flexible working, homeworking, and return-to-work parents ever since we started in 2003. There are not as many homes for those people as you might think, currently.”

KNOW THEE BETTER

According to several SME law firm leaders, this issue constitutes a whole new battleground that's opened up in recent years: the war for talent. Bigger firms have been able to offer bigger salaries, creating problems for SME firms near the major cities, which are unable to match their competitors' buying power, says Tony Williams.

And Ed Turner, managing partner at Taylor Vinters, agrees: “It's been exaggerated in the last three years by the strength of the dollar and the

LPM FIRM FACTS

ESP Law (part of ESPHR Group)

Revenue: £1.9m

Corporate status: Ltd (ABS)

6 fee earners, 13 total staff

Office: Woking

LPM FIRM FACTS

CFG Law

Revenue: £4.5m

Corporate status: Ltd (applying for ABS)

47 fee earners, 71 total staff

Offices: Cheadle, Manchester

LPM FIRM FACTS

Paris Smith

Revenue: £17m

Corporate status: LLP

135 fee earners, 231 total staff

Offices: Southampton, Winchester

LPM FIRM FACTS

Taylor Vinters

Revenue: £20m

Corporate status: LLP (ABS)

98 fee earners, 140 total staff

Offices: London, Oxford,
Cambridge, Singapore, New
York

LPM FIRM FACTS

Pure Business Law

Revenue: Undisclosed

Corporate status: Ltd (ABS)

5 fee earners, 8 total staff

Offices: Bedford, London

willingness of the US firms coming into London to snap up talent.”

The solution, says Turner, is to be as clear about your proposition to prospective employees as you are with clients and insist on getting people that share a firm’s vision. “If you don’t focus on what you offer, you end up with a larger but lower-quality talent pool. So, we pursue people individually, rather than going to recruiters.

“We also emphasise our role in the innovation ecosystem to potential employees, rather than our virtue as a law firm – the best lawyers are looking to work in an interesting and challenging market, and we want people who are motivated to achieve what we’re trying to achieve.”

At ESP Law, Byrne echoes the idea, saying that his firm doesn’t aim to be all things to all people. “We don’t have equity partnership, so we’re not going to appeal to anyone who wants that. I’ve interviewed people who haven’t quite got their head around our business model, and we’re completely wrong for them because they want partnership or a traditional hierarchical structure – and that’s not what we offer.”

The 2007 Act is by no means the only change to how firms work with their staff, however. Jarrett at Pure Business Law says the 2019 SRA rules changes have opened up more possibilities for firms to use freelancers by making it more attractive for lawyers to do work in that way. The result is greater flexibility for both the lawyers and the firm: “We only have to pay out for freelancers when we have the work to give them, and they have more options. Several have told me that they enjoy being able to work hard for six months and then take two months off.”

THE GHOST OF LAW FIRMS YET TO COME

The ghost of law firms yet to come appears before us now ... and there are both potential risks and probable advances on existing trends. Something that’s likely to expand, Taylor at Paris Smith says, is agile and remote working. “We wouldn’t have had people working from home 10 years ago. Now, we’re able to use the physical workspace we have more effectively.” He can even envisage potentially having more people working for the firm than there are physical desks in the office in the next 10 years.

Clark at CFG Law says his firm may go even further. “In 10 years, we won’t have offices in the traditional sense. We’ll have small bases around the country and we certainly won’t have everyone sitting in an office at their desk every day.”



In that model [employee ownership], all employees have an interest in the year-on-year financial performance of the firm. I think that model will become more prevalent in the next five years

Peter Taylor, managing partner, Paris Smith

What about some of the dangers? Tony Williams raises the issue of securing succession. Many younger lawyers are not interested in taking on the additional responsibilities of partnership, he says. “I’ve heard concern about succession among a number of SME firms. People who the management thought would want to be partners have said, ‘No, thank you’.”

This isn’t a trend that firms should necessarily fight against, he says. “This generation of lawyers may not want to stay in a particular firm more than three or five years – they want to learn and develop. Firms have to recognise that the people who leave aren’t traitors – they should be encouraged to leave as ambassadors for the firm.”

There may be a silver lining or two, however. Taylor at Paris Smith believes different business structures in law firms may be all the more appropriate in future – one such possibility is employee ownership. “In that model, all employees have an interest in the year-on-year financial performance of the firm. I think that model will become more prevalent in the next five years.”

Consistently, the theme for the future of SME firms seems not to be a bleak one, but rather a world of sharper focus. Tony Williams agrees: “Various consultants have said that the age of the SME firm is over. I don’t think it is. Technology enables smaller firms to have a very successful future, but they’ve got to stand back and think how they use it.

“I think the SME firm of the future will have a laser-focus on the sort of work it does. And they may not want to be thought of as full-service firms anymore.”

Change has been no stranger to the SME legal sector this last decade, and clearly will be a continuous companion in the next ten years. **LPM**



Merger motions



There aren't many things that John Turner, COO at Ellisons Solicitors, doesn't know about the merger process. He recounts some important lessons from the firm's own merger with Gross & Co., which he oversaw

The most important piece of advice for a legal practice merging with another firm is to plan using the old adage: "Fail to plan, plan to fail." It can be hard to put together an extensive strategy where every scenario has been thought out, as surprises will crop up unexpectedly. When they do occur, you'll need to respond quickly and it's imperative that you have an organisation or governance that allows you to react appropriately.

When preparing for a merger, there are six areas which I consider carefully:

1 FINANCIALS

There are two parts to cover in the financial planning of a merger:

a) Generally, we don't like to talk about money, but when one firm is merging with another it needs to make good commercial business sense. Make sure there is a financial strategy in place because, above all else, merging with another practice will cost money in the short term.

b) When two firms merge I would expect there to be financial benefits, so the firms involved should list any business or organisational synergies in order to highlight potential financial efficiencies or cost savings.

2 CLIENTS

The merger must make sense from a client perspective. For instance, at Ellisons we're very customer focused, so when merging with Gross & Co. one of our top priorities was to make sure that our clients wouldn't be affected. We also made sure that Gross & Co.'s clientele are and will continue to be provided with the same service that Ellisons' existing clients enjoy.

It's advisable to look at services too, and if there are any new services that can be introduced, how they can be cross marketed between the merged firms.

3 COMPLIANCE

In order to provide quality services to clients, you need to ensure that the merged firm's past and current work is and continues to be compliant, and at Ellisons this is something we achieve through Lexcel accreditation, risk management and due diligence. Once you've

considered the potential risks, particularly the risk of future claims, you'll need to decide how the merged firm will be insured going forward. This would involve your professional indemnity insurance, and your broker or the SRA can advise you on the matter.

4 PEOPLE

The word you want to avoid hearing when going through a merger is 'uncertainty'. In a changing organisational and management structure, it's human nature to feel uncertain about your future with a firm which is going through a significant change. However, as a merged firm, you want to ensure that employees come together in a unified way and bring their client relationships with them. It's imperative to manage any uncertainty by communicating with employees regularly, answering any questions they may have, and ensuring that everyone on both sides of the merger is kept well informed and knows what is happening and when.

5 TECHNOLOGY

Technology is an enabler for any law firm and it's never practical to run two separate systems. If you need to integrate two different systems, plan it carefully and take steps to ensure that the process is as efficient as possible, that all employees are given the correct training if required and, most importantly, that it complies with regulations such as GDPR.

6 COMMUNICATION

There are three key areas which need to be taken into consideration:

a) Internal communication. This is covered within the 'People' section of your plan, but it's vital that everyone from both parties is kept informed of progress, consulted if required and is confident that the change in structure and management is best for the business and its people.

b) External communication. Equally as important as keeping staff well versed about the merger is keeping your clients in the loop. Clients who have been loyal to the merging brand could feel their relationships will change. You need to make them aware that a merger is



LPM FIRM FACTS

Ellisons Solicitors

Revenue: £16.3m

Corporate status: Partnership

130 fee earners, 250 total staff

**Offices: Colchester, Ipswich,
Tendring, Chelmsford, Bury St
Edmunds, London**

happening and reassure them that this won't affect the work you're doing for them and it is in their best interests.

c) Marketing and branding. You need to think about the messages you want to convey across all of your channels. The possibility of introducing new services and a newly merged entity can often be met with emotive behaviour from people. If you've worked for a firm for a long time, or created the merging firm, it can become a sensitive matter to witness such a big change. With that in mind, you need to make room across all communications for compromises along the way, and ensure you take the views of

the firm you're merging with into account.

Once you've planned the merger and how it'll be implemented, you need to have regular meetings to work through all the details. As an example, at Ellisons we have fortnightly project meetings with members of both Gross & Co. and Ellisons.

These meetings started during the process, continue to this day and will do so for the foreseeable future. We also have a steering committee, which includes members from Ellisons and Gross & Co., to oversee each project meeting and provide direction to the project team. **LPM**

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COMPLIANCE COMPLICATIONS



Richard Hill, executive council and trainer at the Institute of Legal Finance and Management, and practice director at Stepien Lake, talks compliance challenges for SME law firms

The word 'compliance' is often followed with a huge sigh or groan of despair. Compliance and risk management have always been one of the biggest challenges faced by SME legal businesses and disproportionately impacts them the most. It's a reality we must accept, so what are the regulatory risks we face?

The fact that law firms transact a lot of client money puts them on the radar for financial crime, with the constant threat of cyberattacks and fraudulent scams. Email modification accounts for over half of all cyberattacks against law firms and professional indemnity insurers are reporting more sophisticated attacks leading to stolen client money.

The recent Solicitors Regulation Authority's (SRA) request for firms to provide their firm-wide assessment, required under anti-money laundering regulations, was just the tip of the iceberg in the SRA's increased focus on improving subject access requests following criticism of the legal sector by the Office for Professional Body Anti-Money Laundering Supervision (OPBAS), the body regulating the SRA on AML. As well as writing to the 7,000 at-risk firms, the SRA now plans an 'extensive' programme of targeted, in-depth visits to firms and calling in more firms' risk assessments. The SRA's direct approach of requesting this information has caught many firms unprepared, with many still thinking getting a certified passport is all that is required.

Then we have GDPR, as our hyper connected world becomes more reliant on data and solicitors often hold sensitive data. We must ensure we understand subject access requests and where data is stored, as well as how we cleanse it under the timeframes while still complying with our legal file retention policies.

The new SRA Standards and Regulations have the compliance officers for finance and administration

and the compliance officers for legal practice thinking about the new framework and what it means for their firms.

The nature of legal advice means there is always the dark cloud of a negligence claim hanging over our heads – which for many firms is a major risk – with the hardened and restricted professional indemnity insurance market leading to some firms with no claims not obtaining cover in the recent renewal, according to brokers.

The ultra-regulated and high standards placed on firms can seem daunting but is there a positive side.

The potential positives:

- Consistent working methods – a framework to avoid a wide variety of day-to-day working practices where every solicitor thinks their way is best!
- Protect the business and individuals – highlighting the 'red flags' to watch out for
- Sound business management giving confidence to all stakeholders – for example, PII proposal form asking if the firm has had to report a breach to the SRA, had a data breach, had a lender file request and so on
- Provide a clear framework so everyone understands what (identify risk), how (process for dealing), when (timeframe) and who (people to report to) in the event of a risk arising.

The administrative and negative connotations of the word 'compliance' will not go away but extracting the positive benefits and commercial aspects of sound risk management can tackle the tick box mentality.

The ILFM will be hosting a roundtable risk and compliance session at the LPM conferences in 2020. I hear the groans already but we all want answers, tips and better ways of doing things, so these discussions and sessions are a good opportunity to hear what other firms are doing and how they are dealing with these regulatory headaches. **LPM**



A WORD FROM LPM'S CONFERENCE DIRECTOR



Compliance, growth, IT, oh my – Caroline Cronin, LPM conference director, discusses how people are at the centre for LPM conferences 2020

After chatting to a lot of you over the last few months, I could see clearly that the challenges and opportunities you're experiencing all come back to one thing: your people. Whether it's devising new operational models, planning for sustainable growth, or streamlining your employee benefits, your workforce is the one common denominator that can make or break your success in these areas. So with that mind, we've designed our 2020 LPM conference content to be centred around the human element of doing business.

Other feedback I heard from many of you was that you wanted more opportunities to connect with each other – so at both conferences we'll be offering lengthier breaks with facilitated networking and sessions that are designed entirely around peer-to-peer learning. LPM South also features the LPM Awards, which will be a rowdy celebration of best practice in a sector that has a huge amount of potential and has already achieved so much. LPM North benefits from a pre-

conference networking event the evening before, complete with essential content and pre-arranged meet ups, to help you make the most of your time with us.

Sounds good, right? Well, we've not stopped there. We're giving you three streams of content next year rather than two, to give you more flexibility to pick 'n' mix your favourite sessions. As well as a 'compliance clinic' run by the Institute of Legal Finance and Management, we're covering several key areas of interest, including mental health, employee retention, technology road mapping, the impact of growth on culture, pricing challenges, and influencing and motivating teams.

To those of you who have already booked to attend – thank you, I can't wait to meet you.

To the rest of you – feel free to get in touch with any questions or recommendations; I'd love to hear them. Onwards to 2020! **LPM**

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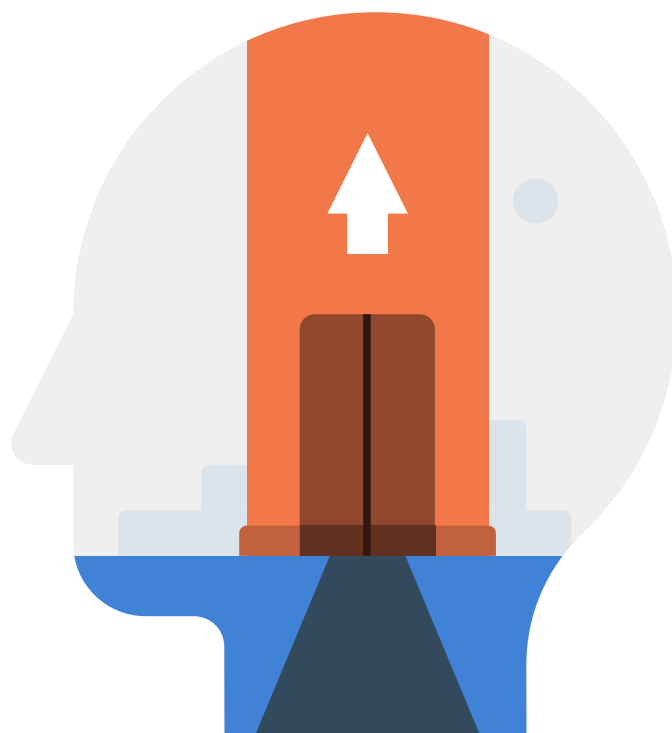
LPM conference polling data reveals what will be on SME legal leaders' minds in the coming years

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On the rise

LPM conferences 2019 polling results are in! What do SME law firm leaders think about trends in the market and what's to come?
Kayli Olson reports

If you've ever had the opportunity to attend any of LPM's conferences, you'll be well aware of our pollster-in-chief Rupert Collins-White and our mini survey about your thoughts on market trends, with which we poll attending law firms on the day. The 2019 results are in and what better way to wrap up the year than with a glimpse at SME law firm market trends as told by you and your peers.

When asked how optimistic you were about your firm's place in the legal market of the future, a pleasant 56% of respondents said they were cautiously optimistic and a further 38% were very optimistic. Very few responded toward the neutral or negative ends of the spectrum. Great news for the market, considering the number of challenges on the horizon – from regulation, economy, clients and more. When asked to rate the challenges your firm will face over the next two years, 50% said they would be more serious or much more serious, and 40% said similar to previous years. SME law firms are seemingly mentally prepared to face these issues head on, either from the comfort of having faced these challenges already or confident that they will be able to face the tougher ones to come.

So, what exactly is to come? To investigate the biggest factors impacting the SME legal market, unsurprisingly the response of client pressures on cost was the top of the list, followed by technology being exploited by firms, and regulatory landscape. These top three factors haven't changed since last year's poll.

Geraldine Collier, finance and practice manager at Dawson Cornwell, says cost is always high on the agenda. "Firms have to find ways of keeping up with rising expenditure and ensure that turnover at least increases in line with the percentage rise of spend.

"Competition to get the client through your door is high and, like any product you're aiming to sell, there needs to be some route to exposure – and if firms fail to take advantage of technology, for whatever reason, then they'll definitely fight to grab good clientele."

She stresses that having a good website is your shop window. "If you overlook dressing it up, it will not be a good money spinner. And ultimately that's what being in any business is about: making money.

"Gone are the days when a potential client would open the newspaper and see an ad about the firm; almost everyone will use the internet to find you. How much a firm is going to charge you is now easily accessible owing to the Solicitors Regulation Authority introducing new transparency rules. Potential clients can see price and service information on the firm's website, and if there isn't a website, then this information will need to be provided in writing should an enquiry be made. Not engaging in a decent website is like a shop not having a front door – you're not going to get any passing trade as you cannot be seen."

Backing this up, Collier says that the type of work you undertake and the level of competency of the person undertaking the work need to be aligned –

Shifting habits



GARY SHAW, DIRECTOR,
ACCESSPOINT LEGAL
SERVICES

for example, a good paralegal can be very useful for taking on the more mundane and repetitive elements of a case, leaving the more qualified person to concentrate on being a lawyer.

"This will reduce costs for the client and help the firm be more competitive. Keeping an eye on how each matter costs through monitoring time recording can be a valuable exercise and assist with calculating profit."

Karen Holden, founder and CEO at A City Law Firm, says: "Many traditional firms are seeing real issues owing to competition, costs and technology but I think firms that are adaptable and innovative will thrive more easily in this changing landscape."

And despite results from LPM Legal IT landscapes report over the years, where SME law firms list bigger firms as their biggest competitor, Holden adds that large firms cannot make changes and decisions quickly – they're slow to adapt to the ever-changing legal landscape.

That being said, Collier points out that SME firms have fewer resources to hand than their larger competitors and sometimes SMEs misunderstand the benefits support staff can bring to the table.

"If there isn't the resource to manage a particular project, be that a new marketing campaign or even a finance initiative, the SME firms will struggle to improve and make the necessary changes in order to survive.

"And firms must keep up with what the regulatory bodies are regularly insisting we all abide by – having the time to observe the modifications being placed upon us is no mean feat; underestimate the time it takes to implement new procedures and rules at your peril – unfortunately they are a necessary evil."

CHALLENGE ACCEPTED

Catherine Wahlberg, managing director at Alsters Kelley, agrees that the key to overcoming the challenges to come will be how individual firms respond to those difficulties. "Business models within the legal sector have changed to be more responsive. Adapting to differing environments, challenges and demands is critical."

Alsters Kelley has learned to be agile. "The last recession was financially tough, but it was also the catalyst for significant change and that in itself is a positive outcome. We got hit pretty hard in 2008 and the impact was serious but we gained a new skillset, too.

"The whole notion of having a three-year or five-year plan is nice but it's very broad. You've got to be prepared to change very quickly behind the scenes. It's okay to change your mind or your direction – you have to do that sometimes. Being

it's interesting to see that around a third of firms say a millennial will potentially be running things within the next five years – so clearly, we have the talent and the confidence moving through the legal ranks.

However, over the last few years, there has been more noise and increasing pressure around the recruitment of 'good-quality people' and it seems that, for the foreseeable future, this will continue. Perhaps we should stop to consider a factor that isn't helping this problem, which is the pressure being applied by clients to drive down costs. Is this preventing firms from taking the investment of time to adequately train and nurture more junior members of staff and grow more talented people? We all know that when we're under pressure it's easier to do the job yourself than it is to ask someone else, but perhaps it's now time to consider more inward investment and relinquish a little off the bottom line.

That said, with a little foresight and creativity some of the simpler admin tasks in the firm can now be automated to great effect and help to pull back some of that lost margin – fewer mistakes, much faster, saving time. Once seen as a hurdle, technology is now very much a hygiene factor in most law firms and, moving forward, may start to help bridge the gap for finding high-quality staff with the growing skillsets of AI and its applications.

For the sceptics out there, we only need to look at the shift in workplace habits. It wasn't long ago that flexible homeworking barely existed, and yet now it's frowned upon for an employer not to at least consider it. The main reason is obvious – can someone be trusted to work when they're out of sight?

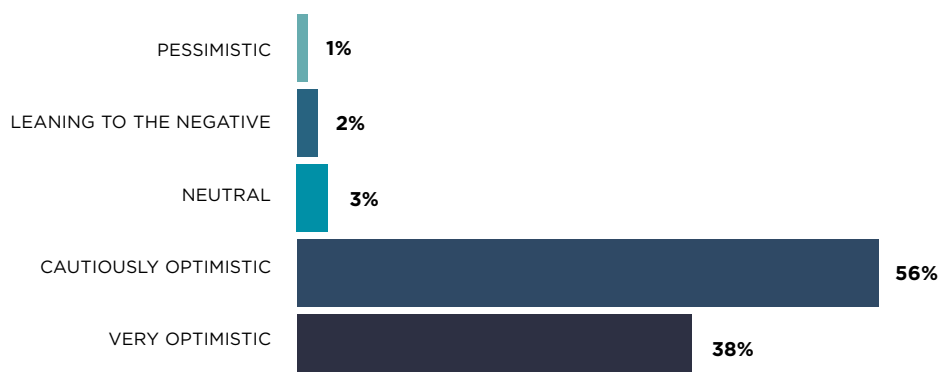
Well again, this shouldn't be a barrier, with the gainful help of technology it's now possible to manage some of this doubt and uncertainty through remote login, scheduled videoconferencing and remote centralised filing systems. The notion of there being a lack of quality people in the market may be promoted by the demand for office-based working.

Clearly, there are many threats to a law firms' existence but surely the key to growth and future prosperity lies within the people behind the firm and the knowledge they each bring. People are our 'point of difference' and surely, with the right guidance, support, technology and tuition, we can all help to fill the so-called gap in the 'quest for quality people'. **LPM**

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1. HOW OPTIMISTIC ARE YOU ABOUT YOUR FIRM'S PLACE IN THE LEGAL MARKET OF THE FUTURE?



responsive can be more important than sticking to a plan.”

Lack of funds, retaining quality staff, making changes, lack of technology and the partnership model are all hurdles that will continually cause issues at some time or other, and for some firms these topics are constant focus points, says Collier at Dawson Cornwell.

“It’s interesting that finding high-quality staff came in at 54%, with making changes following second at 24%. If firms struggle to get changes implemented – as long as they are changes for the better and not just change for change’s sake – then this will have an impact on all staff and, whether you’re a partner or support staff, you’ll want to work in a well-run practice.

“I believe that if a firm lacks respectable leadership then changes for the good will take longer to implement. And along that adjustment period, quality members of staff will become irritated and impatient, which will result in lack of retention. All of the hurdles submitted are related to one another and can have a knock-on effect, which can result in them all becoming a problem at the same time,” she says.

STRUCTURED APPROACH

Something that makes firms more adaptable is the business model. The poll shows that 51% of respondents said their firm is already incorporated as a limited company – with 17% responding that it would be likely or highly likely to happen in the next five years. This trend is certainly nothing new, and the model breakdown seen by the number of SRA-regulated firms backs this up, so it’s a little surprising that a third (32%) of respondents said this was unlikely or highly unlikely to occur in the near future – despite potential benefits of doing so.

Tracy Jones, practice manager at Brown Turner Ross, says: “There are a number of benefits for law firms incorporating into limited companies – a number of tax incentives that make it the more financially viable option, and it allows for more flexible operational decisions, which fits more inline with the modern business world.”

Wahlberg at Alsters Kelley agrees: “We’re an alternative business structure and incorporated already, and that is really important for us. The traditional partnership model is clumsy, and people

don’t particularly want to work under it anymore.

“By not going down the traditional partnership route and being an ABS, we’ll be more able to engage with our teams in different ways and to reward and retain. We have a really strong foundation in our business support function, using people who are experts in their area of work – for example, our business development director is not a solicitor but a BD expert. Being an ABS enables ownership beyond solicitors, which we feel is very important. We want to build on expertise like this.”

With the model to back up adaptability, Wahlberg says there have been some other pressures to evolve the firm’s structure and way of operating.

She says: “We have changed our fixed fee offering and it’s continually under review, however, we’re not finding that clients balk at the idea of the billable hour as long as they understand the value of the service that they’re receiving. Some areas of commoditised work cannot be ignored for alternative fee offerings, but our experience is that clients do still value service. It’s not always about the fee alone.

“Fixed fees bring other pressures to complete the work within cost budget. Clients are aware of that and weigh up what they need and want from a transaction. The desired outcome and subject matter of the transaction influences approach to costs. The important thing is to discuss it openly and for the client to understand what they’re purchasing.”

Holden at A City Law firm highlights the upside to changing fee models: “Some smaller, proactive firms may be able to adapt to the client’s needs far more quickly and set various payment plans: retainers, fixed fees and discounts, to name a few. This enables us to stay ahead and cater to client demand. Some companies have AI tech to cut down the costs, but we fear removing the human element may reduce the advice and support that clients need.”

TALENTED PEOPLE

Jones at Brown Turner Ross says: “The legal sector is recognising that the world is changing; agile working is becoming the norm and technology has enabled this to fit in seamlessly with day-to-day operations.

“Childcare is often a barrier for women returning to work; flexible solutions allow for

LPM FIRM FACTS

A City Law Firm

Revenue: £750,000+

Corporate status: Ltd

10 fee earners, 14 total staff

Office: London

LPM FIRM FACTS

Dawson Cornwell

Revenue: undisclosed

Corporate status: Partnership

33 fee earners, 43 total staff

Office: London

LPM FIRM FACTS

Alsters Kelley

Revenue: £4m

Corporate status: Ltd (ABS)

48 fee earners, 92 total staff

Offices: Leamington Spa, Coventry, Nuneaton, Southam

LPM FIRM FACTS

Brown Turner Ross

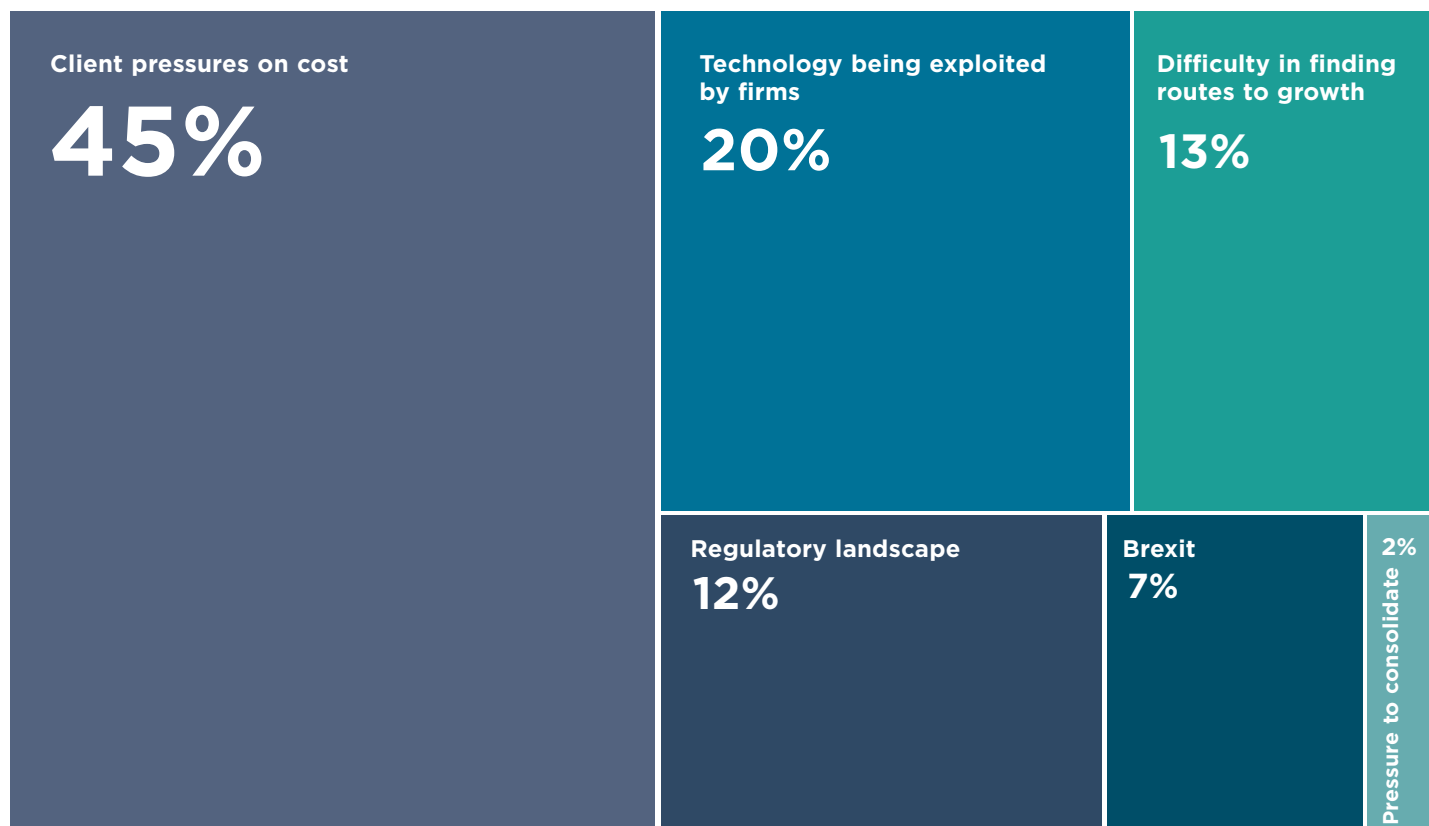
Revenue: £2.6m

Corporate status: LLP

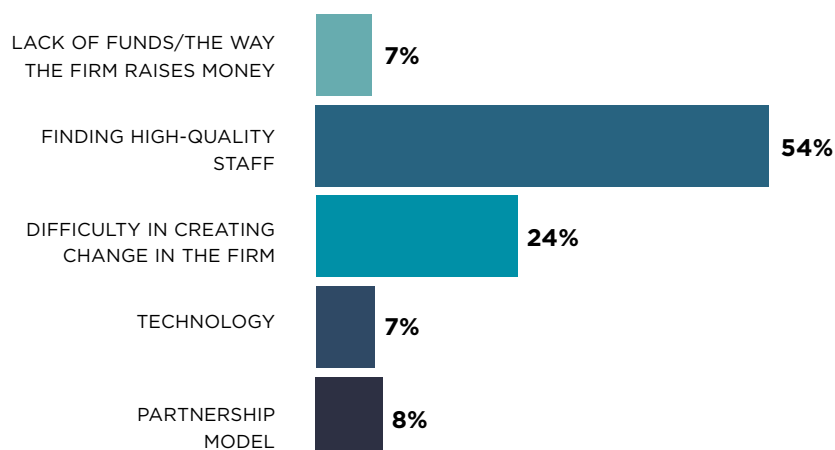
14 fee earners, 31 total staff

Offices: Southport, Liverpool

2. OUT OF THESE, WHICH FACTOR IS HAVING THE BIGGEST IMPACT ON THE SME LEGAL MARKET?



3. WHAT IS THE GREATEST HURDLE TO YOUR FIRM'S GROWTH OR FUTHER SUCCESS?



good staff to return to work and perform to their best ability around their home commitments."

As long as people are genuinely committed, flexible working can benefit both the employee and the firm, Holden adds. "It enables a firm to get the most out of people – supporting family life and the ability to work mornings or evenings around other commitments. We see offering leave, remote and flexible working are key to keep staff motivated. And clients benefit from a happier lawyer."

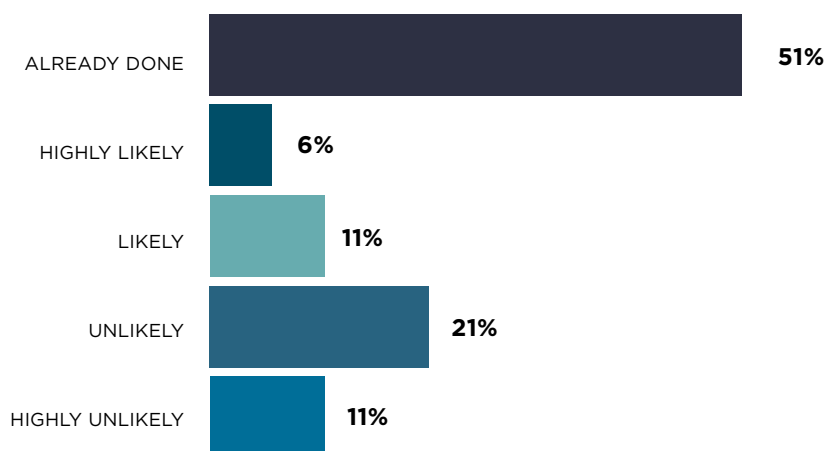
Wahlberg at Alsters Kelley agrees, but points out that it can be harder for SME law firms to offer a high amount of flexibility while at the same time meeting client demands. "If we had larger teams it seems more likely that we could build in more flexibility for staff but there are practice areas that lend themselves to more flexible working than others. There have been different levels of demand across the business for flexible working and we do try to meet staff preferences but really it boils down to the client – the model for flexible working must still meet client demands and preferences."

Wahlberg echoes the polling result sentiment that finding high-quality staff is a big challenge: "The talent shortage is very real and a serious problem not just in our local area but across the UK."

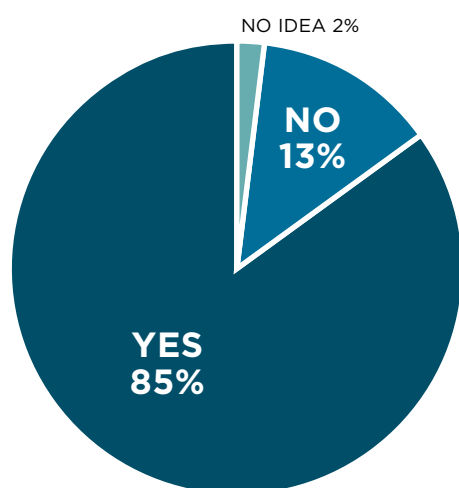
She says it's difficult to get to the bottom of what's caused it. It seems likely to be a number of factors. You don't have to go back very far to when it seemed that there were far more postgraduate law students than there were available jobs, but here we are just a few years on and we don't seem to have enough qualified lawyers, she adds.

"While looking for a one-to-three-year qualified lawyer in a particular discipline, I was informed by a

HOW LIKELY DO YOU BELIEVE IT IS YOUR FIRM WILL INCORPORATE AS A LIMITED COMPANY IN THE NEXT FIVE YEARS?



ARE PEOPLE IN YOUR FIRM OR PROSPECTIVE HIRES INCREASINGLY ASKING FOR FLEXIBLE WORKING SUCH AS REGULAR WORKING FROM HOME DAYS?



headhunter that – within a 30-mile radius of one of our offices – there were only six candidates.”

She says this has had an impact on what Alsters Kelley do as a firm. “It’s important to us that we recruit and retain high-calibre lawyers. The issue is what we do to achieve that. People are looking for different rewards and have different life expectations nowadays. They want flexibility, additional benefits and a solid work-life balance.”

“It’s not just millennials that we have to consider but the whole workforce. It’s diverse and we need to cater for different demands and expectations.”

Holden at A City Law Firm says that it’s important to recognise the difference and diversity in people: “It’s about understanding people. Not everyone is motivated by money, so creating a culture that’s both exciting and flexible is key to retain staff.

“Likewise, some want a clear career structure, while others – a firm must understand – will only stay with the firm for a short duration. Therefore, a constant recruitment plan is essential – as well as an internal promotion plan from within the firm.”



It’s good that the legal sector is facilitating more conversations around these issues. But there is still a lot of stigma around mental health and a lot of work to be done – not just in the legal sector but everywhere

Catherine Wahlberg, managing director, Alsters Kelley

WELL HUMAN BEINGS

Another trend in the market, though not polled at this year’s conferences, is the rise of awareness of mental health and wellbeing at law firms.

Wahlberg points out that, key to running a successful law firm, attracting and retaining staff and providing a good service to clients can all boil down to the wellbeing of staff.

Alsters Kelley has one trained mental health first aider and is looking to train more staff. “We talk about mental health and wellness because it is important. It needs to be an open discussion. We need to learn to notice when people are struggling. We also need to speak up – it helps others to speak up and we can help to manage situations. Treating people well is important. Our culture is based on being kind, helpful and excellent, and it applies not only to clients but internally as well.”

Working in law is a stressful job – no one has pretended that it wasn’t – but it’s also very rewarding, she says.

“I’m really pleased that there is increasing awareness around wellbeing in the legal sector. If there is one message that I give to people, it’s that you also have a responsibility to look after yourself. It’s good that the legal sector is facilitating more conversations around these issues, but there is still a lot of stigma around mental health and a lot of work to be done – not just in the legal sector but everywhere.”

So, how do these challenges and sentiments stack up to those you’re seeing play out at your firm? Hopefully, despite all that’s occurring, you share the optimism of the rest of the market. There are exciting things on the horizon, after all. **LPM**

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CLOUD HORIZONS

Nick Hayne, head of professional services at Quiss, talks about how SME law firms' attitudes towards cloud adoption have changed in recent years, and what the future skyline looks like

What better way to start the new year, and a new decade, than thinking about the future?

Although there are many technologies that should, by 2020, be utterly ubiquitous among legal businesses, the cloud is one evergreen area of hesitancy for law firms. Or, maybe not. Nick Hayne, head of professional services at Quiss, notes a welcome shift among SME firms' attitudes to the technology recently. "In the last two years we've seen a real mindset change – the barriers to acceptance of cloud have now largely disappeared."

What's been holding firms back? Hayne says anxiety around data security is at least partly to blame, which is an understandable consideration. "There has always been a fear around the location of firms' data – we know security is always a massive concern. One way we can get past that fear is to highlight the level of investment that technology companies put into the security features of cloud systems."

But Hayne is also keen to emphasise the fact that the biggest gaps in a firm's cyber protections often aren't technological: they originate with staff errors. He cites a recent project Quiss has undertaken with a food manufacturer around phishing attacks, in which (during a test) 20% of staff clicked on a malicious email, potentially breaching security. "You can put all the technological precautions in place that you want, but it always, ultimately, comes down to your people," he adds.

Naturally, dispelling the doubts and misunderstandings around cloud are important, but Hayne also says there are strategic benefits to wholeheartedly embracing cloud architecture. If SME firms are going to embrace it, then what does he think the next decade will have in store?

Businesses that embrace cloud, Hayne explains, will be able to scale up quickly, owing to the more flexible nature of software as a service and external storage. "If you're looking at a cloud-based IT solution, you'll be paying for all of the architecture, software and comms, but it's going to be paid for in bite-size chunks, rather than

costing £200,000 for kit that sits in your building, depreciating in value by the month."

In addition, he says that increasing use of cloud will let firms reap the full benefits of improved systems. "Cloud is really the underlying infrastructure – the plumbing, as it were – that everything else sits on. But there's a new generation of practice management systems coming soon, for instance, which are cloud-native, rather than the bastardised systems of the past. They're adding greater functionality and can link into more software than before, because they're in the cloud."

STOP, COLLABORATE AND LISTEN

The result of those enhancements, Hayne says, will probably be better use of collaboration technologies. "Firms are spending thousands of man-hours per year searching for emails and documents or searching for things they've done in the past. They're stored in different places: in emails or on different hard drives. Being able to have information to hand about the work legal professionals are collaborating on will undoubtedly be a boost to productivity."

Of course, the world of work is changing, says Hayne, and legal is not immune to changes in generational expectations. Legal professionals are increasingly expecting, and being expected, to have the capability to work from client sites and from home, he says. "Clients are increasingly expecting flexibility, but so is the workforce. Millennials want to work in different ways and, if you want to plug into the right kind of talent, you have to give them the tools to work how they want."

The degree of disruption being experienced by the legal landscape is also on Hayne's mind. "The Big Four accountancy practices are increasingly making their presence felt in the legal market, Amazon are talking about moving into legal, and there are many new entrants creating competition. Firms are, rightly, looking at how to differentiate themselves, and the collaboration that cloud enables can be a key part of that."

Hayne says that firms are still not adopting



many of the collaboration technologies that are out there. "We still haven't really seen the adoption of, for instance, videoconferencing – Microsoft Teams is here, and it's so crucial that firms adopt these kinds of tools. There's also Trello, a collaborative project management tool, and communication app Slack, just to name a couple of things which can help productivity and allow a client to see that you're actively working on a case."

THE FUTURE OF ROCK AND ROLL

One trend that Hayne expects to see continue is the gradual move towards an operational expenditure (opex) model for IT, instead of the more traditional capital expenditure (capex) model. "Over the last eight or nine years we've seen a move in that direction, towards paying for a solution on a monthly or a cost per gigabyte per month basis – more like the way you pay for electricity or broadband."

In fact, Hayne predicts that IT and cloud will ultimately become synonymous: "The word 'cloud' will probably disappear – firms will just buy into IT on a monthly basis. And that will also help to level the playing field. 10 years ago, there were technologies and services that only the big firms could afford – now, SMEs can afford to plug into technology to grow and develop that they couldn't before. That will probably continue to be true in the future, too."



There's a new generation of practice management systems coming soon, for instance, which are cloud-native, rather than the bastardised systems of the past. They're adding greater functionality and can link into more software than before, because they're in the cloud

Quiss, Hayne continues, also has a new project launching around the same time as this issue of LPM goes to print. "We're about to open a new innovation suite at our headquarters that will be looking at legal sector-specific technologies, including security, next generation project management systems and collaboration tools, along with business development and revenue generation technologies."

The goal, Hayne says, is to help both existing and prospective clients in building their technology roadmap. **LPM**

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Mandeep Kaur Virdee, founder and managing partner,
KaurMaxwell

up their own firms is the sheer amount of work and red tape involved in practice management.

She says LexisNexis was an instrumental help when it came to getting the firm off the ground. "LexisNexis made it realistic for us when we started, which was extremely well-received as I wanted the safety of having a solid knowledge base like LexisNexis. Obviously, price was a concern, but it was actually surprisingly affordable for a small practice like ours.

"I've personally found LexisNexis to be excellent. I cannot say enough how difficult and scary it is to actually start a law firm at eight months pregnant.

"The person who was our relationship manager was fantastic and really paid attention, and understood my situation. He was flexible and met me in London when it suited me – as I could only do so many hours and my daughter was only months old. I was anxious about getting a good research and guidance online tool in place and making sure everything and everyone was taken care of."

It can be easy for SME law firms and smaller NewLaw or startups to feel like the technology that larger firms use is out of reach, Virdee says, but with LexisNexis that's not the case.

"It's really nice that they've gone out of the way to make me feel – regardless of how big or small the firm is – that I was catered for. And they took the time to build that relationship with me and my firm, and really understand us, not just from a business perspective but also on a personal level."

TRAIN UP

KaurMaxwell has really been able to hit the ground running because of the firm's swift

adoption of LexisNexis solutions like LexisLibrary and LexisPSL and the support it has provided in ensuring that the practice management side of the business has also been catered for with LexisPSL practice compliance and management. Being such a new firm, naturally, there are still things that need a little ironing out, but it's a lot less stressful because of LexisNexis's help, Virdee says.

Charlene Robinson, practice manager at the firm, adds she is currently in the process of organising more training for staff. "It's time for a bit of a refresher for staff. We use the full suite of LexisNexis products, but we could be better at fully leveraging LexisDraft, for example. The general feedback about the initial training was that it was enjoyable, informative and easy to follow."

Virdee says that staff were encouraged to get on with using LexisNexis right from the beginning and – since LexisNexis provides unlimited and accessible training – if staff feel the need to brush up on something on their own time then that's easily done.

Robinson adds that it's really the approach to the relationship and its valuable research and guidance information that make LexisNexis commendable in her eyes. And, she says, she's even used the resource whenever she's needed some assistance with precedence documents in relation to the firm's in-house policies.

Overall, LexisNexis has a really well-placed business model, says Virdee. "I was afraid that it wasn't going to 'resize' itself to fit the size of firm KaurMaxwell is; I was convinced that wasn't going to happen. But LexisNexis really took our business to heart and is invested in our relationship, growth and success."

She says that, for legal technology providers, being able to speak to a law firm, large or small, or even just a lawyer providing a service, they've got to be able to adjust themselves, and LexisNexis are equipped to do that and much more. **LPM**

ABOUT US

LexisNexis works with customers to drive productive, efficient and reliable business decisions – including solutions for case and matter management.

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TRUST TURNS ALL COGS

Simon Elven, commercial and marketing director at Tikit, on why trust will be powering SME law firms in 2020

What will it take to be a successful firm in 2020 and beyond? Trust will remain an essential component for firms that want to build longstanding and lucrative client relationships. What's new is that, in 2020, technology will play a key role in building it.

How so? Well, for example, the bedrock of trust in legal relationships has to be professional competency. Fundamentally, firms will still need good lawyers, but good technology will buy lawyers more time to do a good job.

In addition, technology can play a role in underlining the professional competency of the firm. Feedback mechanisms triggered by a system event (like the raising of a final invoice) can gather solid testimonials. Or, if a client is unhappy, firms can find that out quickly and trigger prompt action. If their issues are dealt with efficiently and effectively, detractors can become the loudest promoters. This is where a high-performing customer relationship management system will pay dividends.

Another way to demonstrate competency to prospective clients is by having the ability to supply case studies, testimonials and other information at

short notice. It can be a key differentiator in the race to secure a prospective client's trust in the firm's competence. Firms should make a point of providing all client-facing staff with the ability to quickly construct responses to requests for information. It calls for technology that deals with the storage of assets, the internal processes used to submit and approve such assets and their consistent branding.

Next, nothing destroys trust between a client and a firm quicker than a data leak or the firm being found in breach of regulatory requirements. Naturally, mitigating this risk calls for firms to invest in staff training. As importantly, however, it calls for investment in technology which ensures data is always secure and managed in line with client guidelines and appropriate regulation without the necessity for anyone to 'remember' to do anything. With the appropriate technology, good governance 'just happens'.

A third component of trust is transparency. In 2020 invoices that say: "for professional services" won't cut it. Transparency is increasingly expected. This means: clear explanation of the legal process; matters being broken down into milestones; costs explained in detail upfront together with any variables or unknowns that may affect the final total; continual status updates against the milestone plan – and complete and immediate candour if something unexpected happens. Clients should be notified immediately of any possible additional charges. To build trust, firms need systems which enable this level of transparency and communication on a consistent basis and which, importantly, are not too resource heavy for the firm to support.

The fourth component of trust is respect. It's about making the client feel important and valued



Nothing destroys trust between a client and a firm quicker than a data leak or the firm being found in breach of regulatory requirements



from the firm who is meeting that contact will automatically receive an up-to-date and user-friendly dossier ahead of the meeting. That said, the information must be used sensitively. Letting a contact know that they have been 'stalked' through their digital interactions with the firm doesn't give a good impression. Using the data to inform a conversation does.

The final component of trust is reliability. This, in essence, is the firm doing what it has said it will do, when and how it has said it will do it. The client should be told, as much as possible, what should be happening and when. Thereafter, for the firm to deliver on its promises, resources need to be coordinated, processes followed and activities scheduled. While it's certainly possible to do all of this 'by hand', life can be made significantly easier if appropriate technology is used to support the humans. Use of tools to efficiently plan and distribute workload, as well as those that support process automation, can all help in making a firm more reliable and more trustworthy.

It's important to say in conclusion that trust is not built in a day. Developing trust is typically a long-term process. But because of its importance, it is one in which firms should consciously invest in 2020. And the effort will be underpinned and made more successful by the right technology choices. Tikit's P4W, along with Tikit Connect and other partner integrations, can help your firm to meet the trust that consumers want. **LPM**

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

www.tikit.com



by really listening to them, responding positively to feedback and admitting failings, and making them feel you've gone out of your way to make amends if you've delivered less than excellent service.

This can all be supported by customer relationship management technology, which, if used effectively, will give each contact a strong sense that they are important to the firm – without the firm expending a disproportionate amount of resource to do so. As soon as contact is made, information gathering into the CRM system can begin. The trick is to invest in systems that use automation to take the pain out of data capture and organisation.

Subsequently, firms can struggle to make use of the information they have at the point where it is going to matter to the client. Again, the right technology can intervene to ensure that anyone

RETRO MARKETING

Going digital is all the rage, but Maud Rousseau, managing partner at Propero, explains why small firms shouldn't sideline traditional PR and communication strategies

When it comes to law firm marketing strategies, the focus is – understandably – on digital.

However, this can mean that traditional strategies aren't being used to their full advantage. Maud Rousseau, managing partner at law firm-focused marketing agency Propero, wants to change this – encouraging firms not to be scared of going back to basics.

She says it all begins with good content creation. “Most companies forget that it's about the content strategy first, then about the channel you use, and then about what you write or tweet. Going back to basics means having a strategy meeting about your content on a monthly basis, and then marrying that with traditional marketing, which is PR communication with the press. This might be happening online, but it's still traditional marketing,” she says.

ANTI-FAX

So, should firms dust off that old fax machine sitting in storage? Possibly – but not necessarily. It's all about understanding what technology or approach works for the particular situation. “We want to create more brand awareness – which is often misunderstood in the law environment,” says Rousseau.

To take just one example, when it comes to reaching out to customers she sees that professional services can not only benefit from ‘old-fashioned’ direct mail, but that it can make

more commercial sense than digital outreach methods. “At the moment, it's difficult to build loyalty with a customer base because of online services. Anyone can surf online, and it's hard to keep clients returning. Direct mail can create a feeling of loyalty or membership to a brand,” she says. She gives the example of the Waitrose/John Lewis loyalty scheme: “every month you receive a letter with offers such as a free coffee. Targeted offers are the best, and the same strategy can be applied to professional services and B2B.”

Digital alone is not enough, she says. “Of course, firms have client relationship management systems and technology for tracking engagement, but often a lack of conversation is where the problem happens. Once a piece of work is finished, firms forget to keep the conversation going until the same work happens again.”

That's where she thinks it's important to have online and traditional marketing working alongside each other. “For instance, you can send a letter saying, ‘I hope you were satisfied with how we completed your case’, along with a questionnaire on how you can improve. Then keep the client informed about changes in the law, and so on. That way you can build a meaningful relationship with them and understand what they want,” she says. And the very act of sending a letter can show the recipient that you value their thoughts: “A letter takes more time and effort to write and send

ABOUT US

Propero Partners is an award-winning professional services marketing agency that initiates conversations with right-fit new business enquiries and hand them over to you to close into sales.

www.properopartners.com

Propero.



than an email does. Also, handwritten envelopes grab attention and are less likely to be put in the bin without being opened."

Digital is still foremost, though. "Of course, we're very edgy – we do search engine optimisation, pay-per-click and lead generation campaigns. But we also do brand awareness and traditional advertising in trade publications, not just online, says Rousseau. "By blending these methods, we're able to deliver the same information to people on either side of the divide – those who get theirs online and those who still prefer more traditional means," she says.

A COMPLETE SERVICE

"As well as being the marketing provider of choice for law firms, Propero works with them to develop their own skills internally. We can go in-house and do workshops to improve the marketing income – the income that comes from new clients – and lead generation," says Rousseau.

Though she points out that it's difficult to do that: "Lawyers should be doing what they do best, which is looking after the law on behalf of clients, instead of turning their attention to marketing or communications. Having someone look after brand, marketing and communications can take the load off SME law firms with limited resource."

"We can do everything under one roof – from the content strategy through to choosing the channels, monitoring return on investment and lead generation off the back of it. We handle it all. We also provide weekly and monthly reports," she says.

Rousseau sees this approach as the immediate solution for commercial services rather than just doing internal workshops. "The biggest problem is that firms feel like they shouldn't go for a full package, but then realise later on that they want lead generation and often find that no one in the business is equipped, or has time, to actually look after the prospects." **LPM**

TEAMING WITH TRANSPARENCY

Brian Welsh, CEO at Insight Legal, talks honesty and strengthening relationships in the legal market and what it took to start up a legal technology company that's transparent

Insight Legal's story started out in 2011, much like any startup or NewLaw firm. Frustrated by lack of transparency and client centricity, Tim Smith, technical director, decided to quit his job at another legal tech vendor to start up Insight Legal.

"He thought the legal software market was not really giving the customer what they needed. There was a lot of consolidation in the legal market, on both the tech and firm sides, and there still is, but the main issue was that venture capitalists were largely driven by money more than anything else – which can have a negative impact on the technology or IT service provider in question," says CEO Brian Welsh.

And building legal tech is not like in other industries where you can go out with basic functionality and trial and error, Welsh stresses. "There are fundamental things we as an IT supplier to legal have to have – such as being compliant and able to run a law firm account."

WORKFLOW WIZ

In the beginning, Insight Legal provided systems around legal accounts, practice and case management and has built from there. Four months ago, it launched a workflow product.

Welsh says: "One of the things we realised was if you ask five people what case management involves, they'll probably give you five different answers. We were keen to make sure we had a task and workflow-based product or functionality within our system."

Workflows can be a huge benefit to SME law firms, he says – some of the benefits can be felt in one practice area more than others. Conveyancing is an obvious example of the process improvement that can be found when using workflows.

"For a high-volume area like conveyancing, being able to build all of the firm's processes into a workflow element means that it can assign tasks to your teams, send reminders and so on."

To map out these workflows, Insight Legal engages with solicitors and other specialists in the market. He says Insight Legal has done a load

of work around family law and is in the middle of mapping out conveyancing – and for the next financial year and beyond it will continue to prebuild workflows for other areas.

VALUE PROPOSITIONS

Insight Legal's number one value is honesty. Welsh says people often ask why, as surely everyone just expects that, but you hear horror stories in the market. "We live in a software-as-a-service world now, where you pay a monthly fee for technology, but there are still some companies out there that will sign you up for years, sign you to a finance agreement where they get the money upfront and you pay the finance company for three years. That's not SaaS."

"You'd be amazed by the number of people who don't read their contracts and find themselves in difficult situations – despite being legal professionals."

Insight Legal signs standard contracts for either 30 days or 12 months – and if firms want to leave after that, they can have their data back for nothing. "It's easy to be sold by a great vision – and the grass is always greener on the other side – but not always. We've had a couple of clients that have come back to us after experiencing some 'greener' grass. We're happy to take them back and offer the flexibility to allow that."

"Everything we do is client-centric and honesty flows through every single thing we do within our organisation."

Also, he says, as part of Insight Legal's values, we want firms to know that we're friendly and approachable. "If you want to contact us about something, you can do it any way you want – be it by carrier pigeon, telephone, email or in person."

Its market is SME law firms and recognises that these firms have limited time and resource, so want to be as accommodating as possible.

"SME law firms want to be efficient but provide a good service – there aren't enough people readily available who can build workflows for them. And that's not why you employ people in the first place," Welsh says.



SUCCESS STORIES

Its values, honesty and independence are very important to Insight Legal. “We’re proudly and fiercely independent and are absolutely not for sale.

“We can run a successful business because of our pricing model. We don’t need to double the price because we don’t have VCs kicking our backside at the end of every month.”

He says Insight Legal’s values and model have fed into its growth over the years – growing from 30 clients in year one to well over 800. “We’ve been able to add to our reach across the UK – in addition to our offices in Belfast and Glasgow, we’ve moved into an impressive new office in Farnborough. We are also about to open an office in Manchester.”

Insight Legal has been able to strengthen its strategy and operations by developing a layer of management, which helps the business progress to the next level. The management team is well-versed in legal tech and practice management but also has experience from outside the sector – Welsh leads the strategy, founder Smith looks after the tech and Deborah Witkiss, professional

services director, focuses on delivery.

“It’s easy to become pigeonholed and develop tunnel vision about things in the legal sector if that’s all you’ve known. Tim, Debs and I have been in the market for a combined 80 years’ worth of experience. But we’ve done other things as well, and we bring all of that together within Insight Legal,” Welsh says.

What’s going to be crucial for a successful SME law firm going forward is not the use of portals and apps (although they obviously have their place) – it’s getting closer to clients, he says.

“I see technology being able to give solicitors the efficiencies they need to make sure they meet their clients’ needs. I’ve always been a firm believer that people buy from those they trust.

“So, the future of legal services is to retain business by building lasting relationships. But if you spend your time doing that, you need the technology and efficiencies to give your firm and its people the ability to do so.”

And that’s where suppliers like Insight Legal come in – Welsh says Insight Legal wants to help SME law firms improve efficiency and get closer to clients. **LPM**

ABOUT US

Insight Legal is a modern system for today’s legal practices unencumbered by legacy technology and thinking.

www.insightlegal.co.uk

INSIGHT LEGAL
S O F T W A R E

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