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LPM ASKS

*Peter Byrne, CEO at
ESPHR, on building tech
for clients*

PRACTICE MAKES
PERFECT

*What do piloting and law
have in common? Matt
Meyer at Taylor Vinters
takes flight*

Connecting clients

*What needs to stack up
for SME law firms to better
engage with clients?*

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About us



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Welcome to the future. Hope everyone's on track with the transporting hubs, wearable wellbeing tech and flying vehicle airspace car park permits. Or for those more pessimistic, have you got your staff radioactive suits upgraded, air filtration systems running and fully functioning on-prem gardens tended?

There's a lot to absorb as 2020 gets underway, and I'm not just talking about failed future views. Whether it's a fourth quarter rush or first quarter charge, setting things in motion for the year, SME law firms will all be focusing on one thing: clients. To kickstart the year, staff writer Jem Sandhu investigates how – and how well – SME law firms engage with their clients (p14).

Looking for inspiration elsewhere? You won't have to travel far – sit back, relax and enjoy the flight as Matt Meyer, CEO at Taylor Vinters, talks about his experience as a pilot, and what lessons legal can learn (p18).

And, in case you haven't seen, LPM conference season is in full swing. Join us for our next conference, LPM North in Manchester on 23-24 March, which includes a pre-conference event to build deeper connections and share experiences. Don't wait to book, spaces are limited! To find out more and book: www.lpmmag.co.uk/lpmnorth20.

Kayli Olson, editor
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CASE AND POINT

Peter Byrne, CEO at ESPHR – an employment law firm and integrated data and HR consultancy business – on building an employee relations (ER) case management system called MyHRCases

Q Why create an ER case management system?

A It was an evolution. Once we established ourselves in our target market, it became very clear that the demand for a proper, secure and functionally rich ER case management system was also a key requirement. We very carefully researched what was already in place in a large proportion of the customer base and found that many firms – and significantly sized ones – are still managing employee relations activities using spreadsheets. That takes a huge amount of time to keep updating and won't take you near the level of functionality or transformation that you really want. Most of the in-house systems developed for HR don't really meet the needs of the modern and forward-thinking HR department and act more like IT ticketing type systems in their look and feel. Businesses need to stop residing on spreadsheets and bits of paper, or old, legacy in-house built systems and that's what we set out to fix.

integrated offering. Those three services typically tend to be delivered by three very different suppliers right now. And with the specialist third-party ER CMS market being very immature, and employee relations not typically seen as a major strategic investment area by many businesses, our offering is to cut through that and deliver a holistic solution to our clients, offering disproportionate value and transforming their in-house ER capabilities. At the moment, HR teams may well download a set of resources from supplier A, refine as they require and send it off to the lawyers for a peer review if needed – they may then either red-pen a vast array of changes and charge a pretty penny for doing so, or, worst still, ceremoniously throw it in the bin and offer up their own draft, usually using their own set of back-office precedent resources. And then those resources don't always embed seamlessly into the CMS

provided by supplier C and the client will end up paying for really expensive API links or system interfaces and so on to make it all work and hang together as a single 'joined-up' solution. So, when we open and engage with a prospect, the conversation may start out in one area of our expertise and it quickly widens into a much larger advisory and CMS support need. Once you start digging and working with a customer in a truly consultative and collaborative way, you'll unearth key needs very quickly.

Q How is the business structured?

A We pride ourselves on being a disruptor in our legal space – we're much more a people consultancy business than a stuffy old law firm. In fact, we're not structured like a law firm at all – we're an entirely flat structure. To get into the ESP Law advisory team, you need to have at least 10 years' PQE – so we get

really top talent in the legal industry and they all tend to be return-to-work mothers and fathers. We really embrace home and flexible working – it's all the rage now but we've been doing it for 15 years. We have always invested in our own IT – from day one we were exploring advanced cloud-based technology to support our business. Our systems are device-friendly and enable us to work in an agile manner. Another thing is, I don't expect my lawyers to be commercial account managers, do sales or marketing work, invoicing and credit control, and other such non-legal advisory work that many traditional firms expect. My lawyers give great, commercial advice to clients and we have a separate account management and finance and administration team that controls the relationship with the client from a service provision and commercial perspective. It's a no brainer really. I want to take the pressure of trying to be all things to all people away from our lawyers and let them focus on what they have been trained and developed to do...brilliantly well. Our staff are experts in their advisory field, and we don't ask them to deal with the other stuff. **LPM**



Once you start digging and working with a customer in a truly consultative and collaborative way, you'll unearth key needs very quickly

Q How do you go to market? What's your offering?

A We bring together employment law services, online tools and resources and ER case management into one

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Practice and Case Management



The future of mobile apps is bright, but many firms seem reluctant or 'cash-strapped' and are slow to adopt



Engaging minds

GARY SHAW, THE LEGAL WIZ

Client engagement for the legal sector has evolved greatly. We continue to see the methods used to obtain and maintain clients improving through the use of a more considered and joined-up approach. Now, more than ever, firms must pause and look at the environment around them to see how client-centred operations can create new and exciting opportunities to gain that all-important competitive edge.

All too often clients get the short end of the stick owing to a firm's inability to handle the ever-increasing daily volume of client administrative tasks and - let's face it - everyone is under pressure to deliver more while ensuring that there's no compromise on quality. However, now there's help at hand with cutting edge technology in 'intelligent' automated forms that allow fee earners to dramatically speed up their workflows as well as minimise errors made when filling out forms manually. An increase in streamlining data, thus saving days of admin time, will ultimately free up fee earners' time so they can focus on giving the client better service - and ensure that the client stays loyal to the firm. A wide range of automated forms that focus on a number of services - such as family proceedings, property, police station forms and more - are becoming available in the legal industry. It's vital that firms don't overlook the options available to them; investment in these areas can demonstrate to clients that your firm is working on making their 'legal journey' as easy and stress free as possible.

Establishing the main elements of building a resourceful culture of client engagement can be challenging, especially when expectations are being set by new client behaviour every year.

Aside from automated forms, consider and explore software that allows your firm to become more agile and mobile - a big trend in legal that is set to continue as everyone looks to be more progressive and efficient. Sophisticated software technology that pairs

your actions on-the-go with your practice management system (PMS) is now available. For example, taking notes in court and meetings and then having to spend hours typing them up afterwards, resulting in wasted time for you, the solicitor, and slow updates for clients. Technology now allows you to scan your handwritten notes and file them straight into your PMS and client folder in either typed or easy-to-read writing - optimising the time of the fee earner plus constantly keeping the client in the loop.

The future of mobile apps is bright, but many firms seem reluctant or 'cash-strapped' and are slow to adopt. But without a doubt, mobile technologies and a data-driven PMS-centric environment are the future. These apps and the data captured provide great marketing opportunities, which allow bespoke branding for your firm's requirements and direct contact with your clients - keeping them informed about their case every step of the way.

Firms need to understand the behaviour of a client and be able to effectively monitor and track prospects from the moment they enter the firm's website. Gaining valuable insights and demographic data is important for future growth. As we all know, manually following up leads, measuring the volume against conversion rates plus calculating your return on investment can be time consuming and costly. This is why it's so vital to have on your side sophisticated web forms and tracking software on your side, which not only deliver all of the above but go the extra mile in providing valuable intel about your lead - all delivered straight into your PMS.

Integrating technology to boost client engagement capabilities can be a complex transition for many firms. Being able to link all of these factors using intelligent software offers major benefits - providing deeper customer insights, far greater accuracy with data capture, faster means of communication and that all-important competitive advantage. **LPM**

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In a sector where confidentiality is critical, the protection of business data is further enhanced by this technology

Through thick or thin

ANDY BEVAN, THE CLOUD EXPERT

Thin client solutions have waxed and waned in popularity over the years, but with the ubiquity of good-quality networking and the continuing evolution of business requirements promoting mobility and enhanced security, thin client delivery can have real advantages.

What is it about the new generation of thin client technology that has led to it becoming an increasingly sought-after IT delivery mechanism in the legal sector?

Our clients see convenience – anytime, any location, any device – as a key benefit, followed by security and cost-effectiveness. With a thin client, all software except for the core operating system is stored on the server, and the desktop is connected to the datacentre. This means that software installation and patch management can be achieved quickly and easily without making changes to each client computer – a major advantage for small in-house IT teams or widely distributed offices.

In a sector where confidentiality is critical, the protection of business data is further enhanced by this technology. Thin client endpoints are inherently more secure since all data is stored centrally on a server, rather than on a device's hard drive. Minimising the risk of data leakage further, it's also possible to prevent users saving files to local drives, as well as restrict the use of removable media, improving the ability of a business to manage its compliance posture.

Another advantage of using remote desktop thin client delivery is that there are far fewer restrictions on the technology business stakeholders want to use. For example, a fee earner using a MacBook could still run a

Windows application from an in-house server, the datacentre, or in the cloud.

Unlike a traditional on-premise client server installation, where devices must be connected to the local area network (LAN) to consume backend server resource, deploying the thin client environment removes that need. Users can access any application from any location with their full desktop connected to the datacentre. This mechanism also provides a consequent benefit for business continuity purposes in the event of disruption, planned or otherwise, such as an office move, weather event or fire.

We're already seeing law firms taking advantage of this technology. Whether it is Windows remote desktop services, Citrix shared desktop or VDI solution, or the more recent Microsoft Azure desktop services, there's a technology option to suit all budgets and requirements.

For those yet to switch, the potential advantages make it well worth considering. As a starting point, this could mean deploying a small thin client service among key mobile or remote users, for example, rather than the whole office.

In an evolving IT environment, there are a number of advantages to the latest thin client solutions for legal businesses. These include the potential to centralise the management of complex application environments and ensure that data is managed in a secure and compliant way, regardless of where devices are used, increasing device security while reducing management overheads. **LPM**

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The reality is that busy professionals need easy-to-use intelligent mechanisms that ensure client and prospect contact records are not out of date



Winning clients

BRIAN COVENTRY, THE DATA OPTIMISER

Y our firm probably has a large network of known contacts, clients and referrers. These relationships are what drive revenue, yet few firms have the visibility required to identify, protect and grow these relationships.

What does data have to do with relationships? Working tirelessly in the background, your firm's communication systems likely manage hundreds, thousands, even millions of transactions each day. Email and other systems not only facilitate digital communication, but they also log and store data about each of these transactions. This data is something that often goes unused by firms yet, when put into context, this data can provide a myriad of business development and client retention benefits.

For firms familiar with client relationship management (CRM) and practice management systems (PMS), the challenges that surround data and gaining data insights will also be very familiar. The reality is that busy professionals need easy-to-use intelligent mechanisms that ensure client and prospect contact records are not out of date and that, where possible, the firm is capitalising on opportunity.

Leveraging accurate and real-time data presents a whole new range of opportunities. If, for example, you queried your PMS or CRM to understand if the firm has a relationship with a business or contact you are looking to win work from, having no results returned may mean that the firm has had no contact. But it may also mean that no one has bothered to enter their contact into the system. Connecting automatically to the firm's communication systems increases your ability to identify a known relationship exponentially. Having this visibility can help a firm enormously when pitching, looking for lateral hires, prospecting or looking to cross-sell into an organisation.

Referrer relationships can significantly drive firm or group revenue, yet these relationships can easily dissolve if overlooked. The data

captured by your systems can help you to understand where there has been a lapse of contact with one or more referrers, potentially helping to protect and maintain these revenue sources. Many firms will report monthly or quarterly on fees generated by key referral sources, yet by the time a decline or absence of referred fees is detected, the referrer has likely begun referring work elsewhere. Using real-time data can allow firms to proactively manage these relationships, with no effort or input needed by staff.

Winning more work from an existing client is typically much easier, less costly and more likely than trying to win an entirely new client. Using data to identify which groups have and have not had contact with a particular client can quickly and easily allow the firm to identify cross selling opportunities.

Cross selling not only provides the opportunity to increase firm revenue and develop new practice areas, but it can protect a client from being lost to a competing firm who manages to cross sell their services sooner.

Live communication data can also be leveraged to support a range of other initiatives such as succession planning, managing or creating invite lists or developing and maintaining email distribution lists.

The good news is that these capabilities are not limited to large firms or firms with large in-house IT teams and data analytics skills. Developed specifically for professional services firms, Client Sense provides a simple and cost-effective solution for firms of all sizes. By leveraging existing data, Client Sense allows firms to quickly and easily enhance their business development capabilities.

Put simply, relationships drive revenue. Using your firm's communication data to protect relationships and help your firm grow might seem novel or even futuristic, but it really is as practical as using financial data to manage revenue and expenses. **LPM**



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Being open and honest with clients from the beginning, especially when it comes to price, is a sure-fire way to gain their trust

In transparency we trust

ALEX WILLIAMS, THE TECHNOLOGIST

There has been a lot of talk around trust lately, and for good reason. Consumers are, more than ever, wanting businesses to demonstrate they can be trusted throughout the entire client experience. For law firms, the change in the Solicitor Regulation Authority rules last year brought many opportunities to change the way they operate and show trust through compliance with aspects such as price and service transparency. Although law firm compliance can be confusing to keep up to date with, the cost of under-investment is great.

And despite these new regulations being in place, many firms are still not fully compliant when it comes to how transparent they are. Costs must be presented in a 'clear and easy-to-understand format' providing at least a total cost, if not an average range of costs for that legal activity.

A recent Bellwether report highlighted that only 29% of independent law firms are happy to publish their prices. This comes with growing concern that advertising service prices could drive consumers away as they become savvy to the alternatives available. However, efficiency, speed and service are actually still ranked as more important than price among a lot of the public.

Being open and honest with clients from the beginning, especially when it comes to price, is a sure-fire way to gain their trust. Not only this, but it is also an opportunity for firms to showcase their expertise and reputation alongside their prices, which can help to better manage client expectations.

It's no hidden secret that moving property is one of the most stressful experiences during an individual's lifetime, with the British public disliking property agents even more than lawyers, according to recent surveys. Next year will see additional responsibility being placed on solicitors to spot illegal activity when dealing with agents, on top of their current duties to prevent money laundering. The potential introduction of a reservation agreement will build on and increase the trust individuals have when dealing with solicitors.

Communication is key when dealing with your clients, with online portals being on the increase to keep them up to date while also increasing transparency throughout the entire matter.

Change is inevitable in the legal industry, with consumer behaviour set to keep disrupting the sector. All a law firm can do is embrace these changes and ensure their service providers also have a future roadmap to keep up with their demands. **LPM**



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If you reuse passwords, there's a risk that the compromised password will be used to test other systems



The Travelex bug

NICK HAYNE, THE DATA MASTER

When Travelex decided to take its currency exchange services offline after discovering its systems had been compromised by an 'REvil' ransomware attack on 31 December, cybercrime again became headline news.

More disturbing perhaps than the \$6m (£4.6m) ransom, is the cybercriminals' claim to have downloaded sensitive customer data, after accessing the Travelex network six months ago, apparently without anyone noticing.

It's highly likely the hackers will have gained access to Travelex by targeting some of the more than 7000 people who work across the organisation globally, with a range of attack methods, including phishing.

This is why we make no apology for focusing again on cybersecurity. You will have mapped your digital transformation strategy, but unless everyone in your firm lives and breathes cybersecurity, you could face a crippling attack you never recover from, financially or on reputation.

What are some security tips for 2020? Let's start with passwords. Never reuse passwords. Create unique ones every time for every application. Criminals now use automated bots to brute force attack systems using passwords revealed from past data breaches.

If you reuse passwords, there's a risk that the compromised password will be used to test other systems – a great reason to use password managers to ensure unique passwords for every system. And never reuse the password you use to log onto your firm's network.

Any good password manager will work, but only if you and everyone in the firm uses one. Remember, you and your colleagues have to protect your futures, every minute of every day – the criminals only need to be lucky once and it could be game over.

Phishing is still the major problem. The Verizon data breach investigations report cites hacking as the most common threat, with 81% of the hackers using stolen credentials, typically surrendered unwittingly during a successful phishing attack.

Spotting a phishing attack for what it is remains the best defence. And educating everyone within your firm about them – how to identify one and what to do – is the least you should do.

Typical signs of an email phishing attack to watch out for are:

- The sender is unknown to the recipient
- The sender is known, but on closer examination the address is a letter or two wrong – a very common approach
- Nothing in the email seems personal to the recipient
- The email was not expected – parcel status notices, tax refunds and so on
- The email refers to a bank/product/service the recipient does not use
- Words are misspelled, the grammar is poor, or the layout looks wrong for a large corporate
- The email body copy doesn't address the recipient by name
- The message asks for personal information – it may request a single piece that appears innocuous, but when combined with info from previous requests causes a problem.

Importantly, your people must be extremely careful with emails that show any of the above characteristics when combined with a suspicious attachment or a link to a website. Above all, everyone must treat every email with caution and not become click-happy.

And remember, the closer you get to your clients, the greater the risk of cross-infection, which could end a beautiful relationship before it has started! **LPM**

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SYSTEMS ENGAGE

**14 FEATURE**

Happy clients

Are you tuned in to your clients' experience of your firm? **Jem Sandhu** reports on how firms are keeping clients engaged in 2020

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Practice makes perfect

Matt Meyer at **Taylor Vinters** shares how his passion for flying holds lessons for law firm practice

Happy clients

Increasing competition means that it's more challenging than ever to keep clients engaged. Jem Sandhu reports



What's your clients' experience of your law firm? The answer used to be largely limited to actual transactions done for a client: ensuring that the firm stayed on clients' radar for possible future business.

But clients increasingly expect more from their law firms and firms must be creative in providing a good client experience.

"When it comes to client expectations, there's now a greater emphasis on personalisation, speed, and ease of service. How a firm interacts with its clients is critical to driving client satisfaction – which itself results in future buying decisions and recommendations," says Amy Hickman, marketing and business development director at Orpington-based Clarkson Wright & Jakes.

ON THE WEB

Websites – increasingly seen as a firm's storefront – now play a big role in engaging both current and potential clients. Depending on the practice area, they are fast becoming the first point of call for contacting a firm – not to mention the subject of increasing scrutiny by the Solicitors Regulation Authority (SRA), which now expects that critical information, such as pricing, be transparent and easily available online.

Clarkson Wright & Jakes launched a new

website in September 2019. "Owing to various changes made to comply with new legislation, including GDPR and price transparency, our website was becoming difficult to navigate and didn't reflect who we are in today's market. A mobile-first design was a priority, and imagery needed updating. The site is now more client-centric and hopefully clients can relate to it," says Hickman. The firm is seeing an increase in organic website traffic, and continues to attract 20% of its new business through the site. Call tracking software is also helping it understand how they deal with new enquiries from the website.

Sarah Jordan, head of marketing and client relations at Band Hatton Button, adds that in addition to grabbing someone's attention quickly, websites must be easy to navigate: "Clients, or potential clients, should be able to find information easily – especially contact details. And clients should be able to correspond in the manner they choose."

However, law firm business development adviser Bernard Savage thinks that some small firms are over-optimistic about the extent to which websites can engage current and potential clients. "A website is important for a personal injury firm, and for conveyancing – a transactional, commoditised area where people do search online for lawyers," he says. But commercial corporate or employment legal services, for



example, are a different matter: “In-house solicitors don’t search websites if they are looking for a lawyer.”

A WELCOME RECEPTION

In terms of engagement, Savage is not a huge believer in prioritising the digital over the material law firm itself. “Don’t underestimate how much clients care about how you make them feel.”

“If a firm specialises in the tech sector, I expect to sign in at reception with an iPad, not pen and paper. If it specialises in agricultural law, I expect to see relevant publications, such as *Farmers Weekly*, on the coffee table.” He calls this “brand congruence”.

And with a little bit of creativity, the reception area can be set up to inform and engage waiting clients and prospective clients. “If you have a flat screen there, why not run client testimonials on it rather than laying out brochures that no one will pick up?”

He also advocates promoting clients throughout the firm. “This is easy to do. For example, if you have a client in the food and drink sector, use their products in your meetings.”

Savage dismisses the idea of sensitivities around firms publicising client names as that information is already in the public domain.

That said, Alex Hamilton, CEO of Radiant Law, cautions against a reception area looking too expensive. “As law firms get larger, they often feel the need to show more marble in the reception area as well as increase the support cost per lawyer. Looking expensive may not be the smartest strategy when clients feel that legal services are overly expensive,” he says.

AROUND THE CLOCK

Ask any customer about their impression of a company’s professionalism and credibility, and they’ll think back to their communications with that company. Was it timely? Was it relevant?

Clients are so much more demanding: unwilling to tolerate even the slightest delayed response to a query, Hickman points out. “You have to be always on, always now. Their decision-making is much quicker and they want an equally quick response.”



*If a firm specialises in the tech sector,
I expect to sign in at reception with an
iPad, not pen and paper*

Bernard Savage, law firm business development adviser



Clients still just want to be able to speak to someone. It's not all automated

Amy Hickman, marketing and business development director, Clarkson Wright & Jakes

And although Savage is critical of technology, he sees that it can play a useful role outside of core office hours. "There are still many small law firms that are closed when a client calls at 5:15pm," he says.

Chatbots are one such technology that can fill in the gaps – providing instant responses, 24/7, to the most common questions. If current and potential clients can connect with the firm outside of working hours, they're less likely to turn to another firm.

Like most SMEs with a varied client base, Band Hatton Button extensively uses email to communicate, says Sarah Jordan, the firm's head of marketing and client relations.

Email is efficient and, more importantly, ubiquitous. "But if the client prefers an alternative means of communication then we'll use that if possible," she says.

The firm uses a variety of instant communication methods. "We recently installed a chatbot; it isn't hugely busy, but it is used. We also text clients and interact with them over social media," she says, noting how popular these methods are becoming.

Clarkson Wright & Jakes will be considering further technological improvements for 2020 and hasn't ruled out installing a chatbot – aware that the project will involve much more than just putting it up on the website, says Hickman.

"We need to think carefully about engagement levels and defining when the client has a complex enquiry at which point it is connected to a member of the team," she says.

The firm learned a lot from having a chatbot on their clinical negligence web pages in 2018. "Chatbots need to be used across the whole site, not just for one service area. Otherwise, it makes it hard to attract that engagement," says Hickman.

Perhaps more importantly, clients increasingly expect instantaneous updates about the progress of their cases and answers specific to their matter.

Clarkson Wright & Jakes' new practice management system will deal with everything from client onboarding to matter management. In time, they hope to use the system's client portal.

"We'd like our conveyancing clients to be able to log in and check how the sale or purchase is progressing. It could be similarly useful for probate matters. We're trying to meet our clients'

expectations around when things will be ready for them," says Hickman.

Partly to meet this demand for instant answers, Band Hatton Button offers a residential conveyancing tool that provides clients with a quote whenever they want. The firm would also like to enable clients to access a client portal straight from the existing practice management system in general. "We want them to be able to get updates at their convenience," says Jordan.

KEEPING IT REAL

Savage thinks that technology shouldn't be a replacement for actually engaging with clients, but more of an add-on.

He says these technologies also risk annoying and alienating clients. He likens such "cheque book marketing" attempts at engagement to auto mechanic dealerships sending update videos to customers showing their car in the process of being fixed. "I don't have time to watch videos," he says.

Hickman agrees that firms shouldn't completely do away with personal contact; it has played a large part in Clarkson Wright & Jakes' having retained many of its clients. "Clients still just want to be able speak to someone. It's not all automated," she says.

In addition to being available in person, the firm's other initiatives focus on keeping clients interested in the firm over and beyond just providing legal advice. "Various things like running lunchtime employment webinars for HR professionals and hosting fundraising events for a local charity, have played a massive role in engaging with people," she notes.

Jordan echoes the sentiment: "Band Hatton Button's mission is to deliver excellent legal services with a human touch. We're technologically advanced, but we don't want to lose sight of the human factor."

Not every client will need communications via instant messages, or even email – no matter how efficient. One way of ensuring judicious use of technology for engagement is to segment the client base and assign different priorities for different levels of client, says Savage.

"If a client is categorised as 'important', perhaps because the firm wants to work with them for many more years, then engage with them face to face. If it's a low-billing client, and there's little opportunity of a repeat purchase, that lends itself to an online engagement solution," he says.

CLIENT SERVICE REVIEWS

Client engagement is critical not just to keep the firm at the forefront of current and potential clients' minds, but to dive into what those minds are thinking and find out what their needs are. Sending out questionnaires once a transaction is completed is an easy and practical starting point.

Clarkson Wright & Jakes sends out a satisfaction survey to clients after a matter has concluded. "It's valuable for understanding client experience and measuring what clients say is

LPM FIRM FACTS

Band Hatton Button

Revenue: £5m

Corporate status: ABS

37 fee earners, 88 total staff

Office: Coventry

LPM FIRM FACTS

Clarkson Wright & Jakes

Revenue: £6.6m

Corporate status: Ltd

39 fee earners, 74 total staff

Office: Orpington

LPM FIRM FACTS

Radiant Law

Revenue: not disclosed

Corporate status: ABS

37 total staff

Offices: London, Cape Town, Toronto



important to them,” says Hickman.

Savage also recommends – at least for bigger clients – that firms do independent client service reviews. “These reviews involve a third party periodically visiting your client to ask ‘How’s it going? What do you like? What don’t you like? How can we improve?’” he says.

But he’s found that such reviews are a hard sell to the law firms he works with: “Perhaps they’re worried that a partner who has been doing little client care for 10 years will be exposed.”

He has seen demonstrable benefits when firms take independent client service reviews seriously. “The return on investment is high – it demonstrates to the client that they’re valued. And listening can uncover other opportunities to sell,” he says.

Part of what makes alternative legal providers such a competitive threat is their ability to quickly respond to client needs. Hamilton thinks that the traditional law firm model can make it difficult for clients to be the focus.

“The traditional partnership system empowers those who have done best under the old ways of working to veto new ideas. It drives short-term thinking. Though this model does work well when a collection of experts each can meet their client’s needs and draw on colleagues’ expertise as needed,” he says.

CLIENT RELATIONS SPECIALISTS

Dedicated client relations roles can be seen as the ultimate personal touch: a serious commitment to being client-focused.

Separating out the non-legal side of the law firm’s relationship with the client has become a common practice in large firms. Hickman has seen it start to trickle down to SMEs. “They will look after client relations, deal with and follow up on new enquiries. This frees up lawyer time,” she says.

Jordan at Band Hatton Button adds: “It’s very much the case that such roles are emerging. Our client



The traditional partnership system empowers those who have done best under the old ways of working to veto new ideas. It drives short-term thinking.

Alex Hamilton, CEO, Radiant Law

relations team deals with all new business enquiries and assists at various points along the client journey. They enable lawyers to be lawyers.”

According to Hickman, client relations roles don’t necessarily need to be filled by former lawyers, though she thinks that some legal background is required. “You also have to be a strong communicator and be respected by the partners. And you’ll have to influence a broad range of stakeholders such as employees and clients.”

Savage is ambivalent about the value of dedicated client relations positions. He says that firms must ensure that such roles show genuine commitment. “Some of these roles are created to give the impression that the firm is focused on the client.”

His view is that clients still prefer to engage with the people who are actually doing the work. “The lawyer should take the lead. The client relations person should be in the background providing support, not fronting it,” he suggests.

It’s clear that when it comes to client engagement, the starting point is not deciding whether or not to invest in engagement technology (or in dedicated roles), but to first really understand your client. “There needs to be an unblinking focus on what clients need,” says Hamilton. **LPM**

Matt Meyer, CEO, Taylor Vinters

PRACTICE MAKES PERFECT

What can SME law firms learn about automation and procedure in aviation?



I come from a family that's deeply imbedded in the air force, and grew up on military airfields, so flying is in my blood. I had an RAF scholarship and studied geography before going into law, but flying has always

captured my imagination and been part of my identity – as an activity but also as a community of people.

I got my private pilot's licence – the first rung of the aviation ladder, which gives you the ability to fly yourself and others, but not for reward – when I was a trainee solicitor. Getting an aviation licence is a bit like qualifying to be a lawyer – you have a ticket, but you don't have the experience, so you work to build that up. In professional practice, like piloting, you spend the next period building up that experience of difficult situations and learning and reflecting on those. It's not the stuff you find on a syllabus generally. It's a bit of a cliché, but both professional and recreational skills are a lifetime of learning.

I remember the first day I flew solo. It's a really weird feeling because you take off and quickly realise that the only person who's going to get this thing back on the ground safely is

you – so the pressure is on. It's not a bad lesson for a business actually. These days it's very rare to find yourself completely on your own. Being self-reliant and disciplined is a good lesson.

The thing I like most about flying is the space and freedom it gives you. There's nothing better than being at an airfield in the morning with a sense of possibility. And you can fly in so many different ways: how do I get from A to B in the quickest, most efficient way? Or, in the case of glider flying, which I've been doing since I was 13, how can I use the weather to get where I want to be? Sometimes the destination is important and sometimes the journey. It's a completely different environment from the office – my role at Taylor Vinters is about human relationships, conversations and dealing with the challenges of running a firm, whereas aviation is more focused, technical and procedural. That contrast of mind really appeals to me. Just recognising the difference helps you draw the best from both worlds.

When it comes to tech and change, aviation is not unlike the legal sector. In an increasingly automated cockpit environment, air traffic control has become less about getting permission to do things and more about traffic management and information flow than it used to be. The systems in the cockpit, the standard operating procedures and data we now have access to onboard, have done a lot to improve safety and ensure consistency. They help you manage workload and focus on the important things.

In the commercial flying world, the automation of traffic flow is partly driven by the need to increase capacity in busy airports and airways, but also about helping the environmental agenda with efficient traffic



management. And in modern aircraft, with digital glass cockpits and automation, it's less about manual flying and more about managing and interpreting systems and data. I think law is on the same journey.

Lots of flying safely is about standard operating procedures, which is interesting because Taylor Vinters' approach is definitely not that and we try hard not to tell people how to do things, but to give them an environment where they can do the right thing. There's an art in trying to find a balance between creative, supportive environments and setting standards that need to be adhered to. In aviation, very little is principle-based whereas in law firms, that's the way to go. But, what's clear in aviation that can be less clear in business is who has the ultimate responsibility in different situations. Clarity on that can and does drive good behaviours and decision making.

Aviation is partly about flying but a lot of it is about confidence and decision-making – and being a part of a network of connected people all relying on each other. Developing broader skills is important too; this really becomes apparent when you have two growing teenage kids, as I do. I'm strongly of the opinion that you should take inspiration from many different sources.

You get to a point in your career where you realise that your job is to make other people really successful – I want to teach people how to fly better and more safely as well as give law firms a different perspective on running a business and practicing law. There are certainly many lessons that legal can take away from the aviation world and I share some of this with the staff coming through at work in a 'lessons from the cockpit' training session we do in-house. **LPM**

HOW TO MAKE YOUR FIRM SOAR

1 Trust your instruments

Your instruments are giving you data and information, often now in real time. The skill is taking that data from a bunch of different sources across your firm and using it as a decision-making tool. We don't trust our instruments enough in law. The data is there, so use it.

2 Invest in crew co-ordination

That soft infrastructure of decision-making, communication and culture is what creates a really safe operating environment in aviation; the same is true for law firms. And law firms have a tendency to underinvest in their people skills.

3 Embrace change

Automation in the cockpit, air traffic control and engineering has completely changed the aviation industry in a positive way. It's created a safer, more efficient and environmentally friendly operation but we still need pilots. And law firms still need lawyers, we just need to use tech to help manage workloads, achieve consistency and focus. **LPM**



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COMPLY WITH ME

Gemma Garnen, quality and compliance officer, Ellisons Solicitors, on three myths when it comes to complying with regulatory requirements

Myth 1

COMPLIANCE WILL GET EASIER AS THE SRA MAKES THE REGULATIONS SHORTER

The regulations are getting shorter but firms need to understand they are getting 'sharper' and more focused on tightening their supervisory arrangements to manage risks.

Myth 2

ALL STAFF DO NOT LIKE COMPLIANCE

Staff in general are predisposed to dislike compliance because of misconceptions about compliance being so burdensome and so on. However, a lot of staff also appreciate, and in fact like, the assurance, order and discipline that compliance engenders.

Myth 3

COMPLIANCE IS EXPENSIVE

Non-compliance is more expensive.



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A perfect partner

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TAXING NEW RULES

Tim Smith, technical director at Insight Legal, says Making Tax Digital provides firms with a client service bonus opportunity, if they choose to take it

The first year of Making Tax Digital (MTD) for VAT, known as the soft landing period, ends this April. During these first 12 months, VAT-registered firms used to keying in their quarterly return have been required to install suitable software that records all VAT transactions and then submits the data to the HMRC via an application programming interface (API). For firms without a compliant legal accounts package or that use Excel to record their accounts, bridging software can be used to meet the electronic VAT filing requirements.

There will be firms choosing to use the bridging software option to help get them through this first year. However, as the name suggests, soft landing was only meant to be a temporary measure. It does not deal with other key elements of MTD compliance such as digital record keeping.

IN IT TO WIN IT

What does this mean for law firms? The reality is that those firms who are operating the oldest systems are most likely to be at risk.

It makes no commercial sense for a developer to pour resources into old and redundant software. It's

like polishing a Ford Escort and believing if you buff it well enough it will be like a new car. Just because the legal IT system has worked well in a practice for many years, should not mean it is 'fit for purpose' in today's business environment.

Software suppliers are ploughing development resources into their current platforms, making them relevant and easy to use in today's world. That includes in relation to MTD, plus a host of other features designed to enhance client engagement.

The end of the soft landing period in April may act as a necessary 'trigger' for firms with legacy (old) systems to consider their next step. Clearly, a developer would prefer to migrate all its legacy customers to its current platform. That makes sense for them, not least from a consistency of support point of view. It may not, however, always be in the best interests of the firm.

SUPPLYING CHANCES

What should law firms invited by their supplier to upgrade do? A firm in possession of an invitation to upgrade to a successor system from its existing supplier because the current software is not MTD-compliant should consider:

1 THE TIME NEEDED TO PLAN FOR A NEW SYSTEM.

The average time from old system to new is three to six months. Doing nothing is now not an option.

2 WHAT'S ON OFFER FROM THE EXISTING SUPPLIER?

Ask for a detailed proposal from the supplier of exactly what their deal is for your practice to migrate to its current platform. What are the costs; is any 'special offer' time limited and what are the implications if you choose not to take the offer up?

Discuss and agree internally what your firm needs from any new IT software. Take the opportunity to discuss what your practice really needs its IT system to deliver beyond just compliance. Put a client at the



Software suppliers are ploughing development resources into their current platforms, making them relevant and easy to use in today's world



centre of any thoughts – step into their shoes and think: how could what we do be more efficient and client-friendly? Examples might include:

- Bespoke workflows and automated processes that prompt repetitive and regular tasks.
- Integrated online legal forms.
- Mobile working. The ability to progress matters on the move or at a location other than the office.
- Telecommunications apps, for example Skype, that allow progress meetings without being in the same room.

There is value in saving clients' time and engaging more effectively. Both can have a positive effect on the firm's bottom line.

BROADENING EXPERIENCE

Which other suppliers offer a migration path from your existing system? Research other suppliers on the market and find out about those with a good track record of migrating from your current system to theirs, and which can meet your new criteria for client engagement.

With many years of historical accumulated data, live matters and finance records, it's inconceivable to accept a situation where data must be re-entered manually in exchange for successful migration. This area can be a minefield for firms, and not every supplier is equally

co-operative once they have resigned themselves to losing a customer.

What will the customer experience be like?

There are broadly two types of software supplier: independently owned and capital-backed. The former tend to be smaller. The people investing are working in the business and their success is inexorably connected to the satisfaction of their clients. The service culture tends to be more human-to-human. Capital-backed means developers backed by external capital are motivated more by scale (and the economies that result). It suits their model for each customer to be alike and the style of service may be more corporate and less personal.

How can I believe that what a software company tells me is true? Look for external factual indicators. How long have they been in the market and how successfully are they adding new customers and keeping existing ones? Is there a steady stream of credible case studies and testimonials collected over time? What independent awards or accreditations exist to support claims about the quality of product and service?

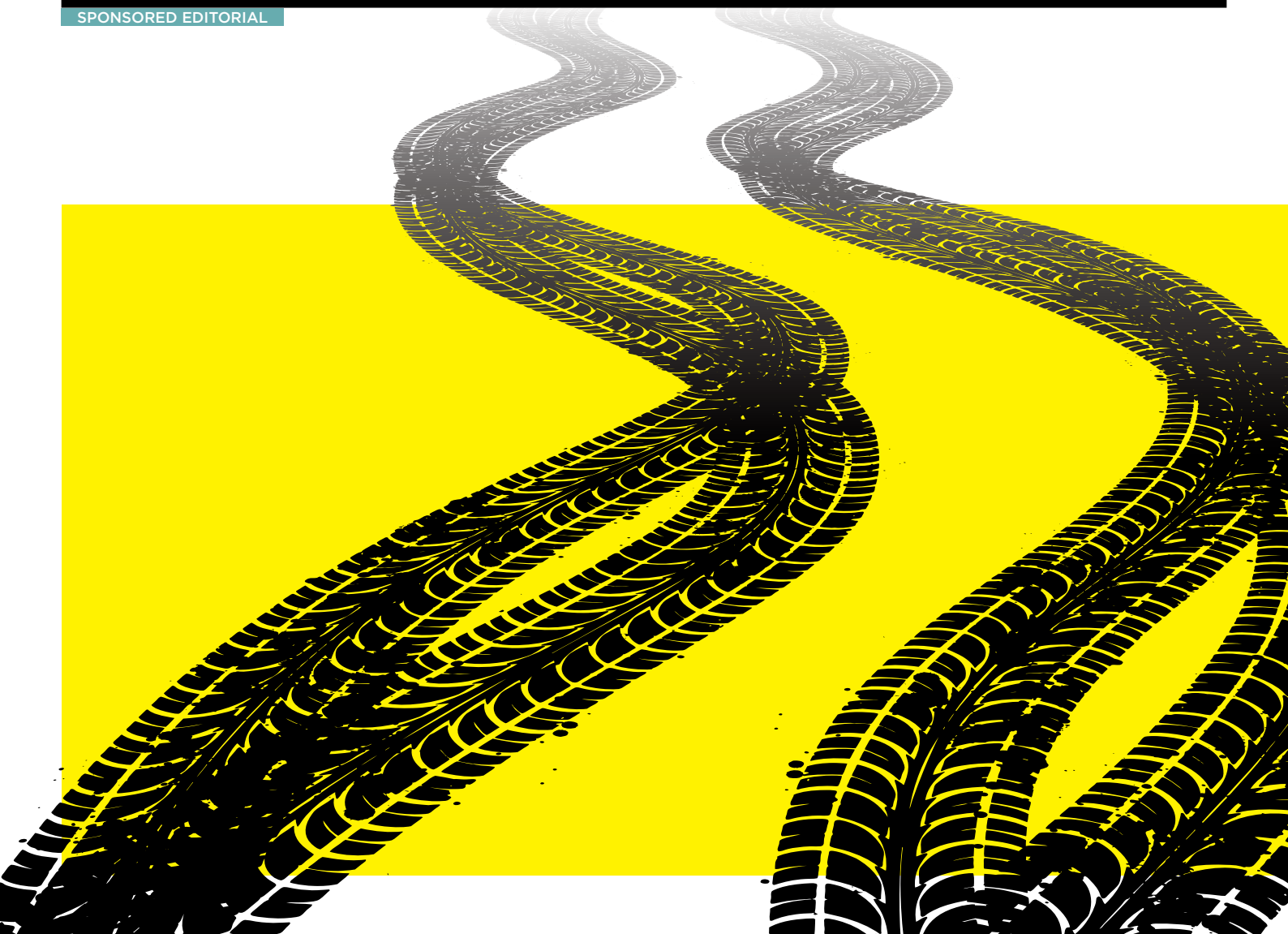
Competent suppliers will provide compliant software. Many have a genuine appetite to work with firms that want to go further, and explore how IT can facilitate better and longer-lasting client relationships. Take the opportunity to engage; you may be surprised at what's possible. **LPM**

ABOUT US

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TRACKING SUCCESS

Julian Ganley, IT manager at Parker Bullen, explains how InfoTrack's integration powers helped the firm put its two offices back on track

One of the main obstacles to growth in any modern business is the complexity of processes and IT systems necessary to their functioning. Law firms are not immune to those challenges and ensuring uniformity across geographically separate offices at Parker Bullen was the task given to IT manager Julian Ganley. He explains that the firm hired him in 2016 to untangle its tech and help it grow into the next decade.

"We're currently a £3.6m turnover business and we're aiming to grow organically to £5.5m in the next five years – we're not really looking at acquisitions." As conveyancing is a major part of

the firm's business – approximately 30% of its staff work in that area – Ganley says that getting that right was crucial to the firm's growth plans.

However, the firm's IT setup was holding that endeavour back. Ganley explains that, when he arrived at Parker Bullen, it was using three different case management systems (CMS) across different departments. "Everything had to be duplicated to deal with invoicing and time recording, which was very time consuming," he says.

Ganley's goal was to streamline the firm's IT setup and find a single CMS that could cover all of its caseload – Tikit's Partner4Windows platform was eventually chosen because of its

ABOUT US

InfoTrack leads the digital development of conveyancing with award-winning technology. By accessing a single platform, legal professionals can enhance service levels and grow profitability.

www.infotrack.co.uk





The charges that InfoTrack makes come straight into Tikit and the account, so the conveyancing person doesn't have to do anything at all. The slips get sent straight to accounts for approval

third-party integration capabilities. And, when it came to looking for a new search provider, the firm wanted full integration there, too: the solution to that piece of the puzzle was bringing on InfoTrack.

BRAVE NEW WORLD

Although Tikit, which went live in September 2019, was a vast improvement on what came before, it was only the first part of the integration puzzle, as the existing search services used by the firm were unable to integrate with the new CMS. "Everything, in relation to slip processing, had to be manually entered into Tikit. All of our quotes had to be manually created. That meant a lot of administrative work but also potential errors – which then had to be credited and charged to the client account again." After implementing InfoTrack's systems, however, all of that changed.

In addition to its CMS, he says that the firm had been looking to bring its website into the new decade. "The initial design for the new website included our own quote system, which wouldn't have integrated with InfoTrack – it would have been a manual entry system. But, while our managing partner was developing the website, he identified that we could integrate the online quoting system directly with InfoTrack if we used Perfect Portal, because all of those systems talked to each other."

Ganley explains exactly how the integration of its various new systems intertwine when creating a conveyancing quote: "Perfect Portal is integrated with InfoTrack so we can go to the Perfect Portal page, key in the property details, and then InfoTrack will pull the correct searches for that particular postcode. That information goes straight back into Perfect Portal; it's itemised in the quote facility, then it goes out as an email to the client with a PDF attachment; the quote, with our fees, is stamped into that alongside InfoTrack's search fees. The two systems together work brilliantly." And much of the quoting process is also dynamic: "Now, if any of the search fees change, the website will pick that up automatically, because of these integrated systems."

MUTUAL BENEFITS

Being able to integrate this trio of systems not only delivers the individual benefits of all three, it also stacks their efficiency gains on top of one another, Ganley says, as it creates a "single source of truth". "InfoTrack pulls relevant

information out of our CMS – and it only needs to be entered once. The administrative overheads of having to key the same information into three or four different websites is so time consuming, and the potential for errors is a major liability too. Conveyancing jobs take less time now – that's very important to us," he explains.

He says that the biggest time-saving gain due to automating processes has been in slip integration: "The charges that InfoTrack makes come straight into Tikit and the account, so the conveyancing person doesn't have to do anything at all. The slips get sent straight to accounts for approval."

And with those efficiency gains the firm has been able to make better use of its human resources, he says. "Now that the search process has been streamlined, we have junior staff members taking on those tasks to a larger extent. The fee earners are freed up to do more fee earning."

PROCESSING TIME

Meshing these complex systems together seems daunting, but Ganley explains that, when it came time to integrate InfoTrack's software with Tikit and Perfect Portal, InfoTrack did all the work: "They mapped all the API links within their system into our system – they basically did all that for us." He says the delivery and implementation went so well that, despite having weekly meetings scheduled with the firm's InfoTrack account manager, there was little to discuss: "It got to a point where I didn't need to talk to her – everything was going so smoothly."

Overall, Ganley says there's been very little disruption. "We do have people who struggle with change, but I've not heard a peep out of anyone while we've been moving over to InfoTrack. The times we have had queries with specific searches they've been addressed by InfoTrack's helpdesk. They're very hands-on, which is really helpful; our staff can have an online chat or just phone them up, and they're able to screen-share to see what's happening," he says.

Ganley says that Parker Bullen still has more to gain from its partnership with InfoTrack, however. There are a number of features it hasn't tapped into yet, including an anti-money laundering facility and an online API and SDLT form submissions system, which it will come to in good time. "Currently we're taking a one-step-at-a-time approach, but we'll be taking a look at those things later in 2020." **LPM**

LPM FIRM FACTS

Parker Bullen

Revenue: £3.6m

Corporate status: LLP

37 fee earners, 65 total staff

Offices: Salisbury, Andover

A PERFECT PARTNER

Karen Turner, business development manager at PCS Legal, explains how Perfect Portal has helped the law firm realise efficiencies and win new business

In 2018, PCS Legal – a Basildon-based specialist conveyancing and probate firm – had come to the realisation that the provider of their longstanding quote platform wouldn't be doing any further development. "The platform was actually hindering us," says Karen Turner, the firm's business development manager.

Quotes are the firm's lifeblood – generating and getting them out quickly is crucial. PCS Legal needed a platform that could keep up, not only with its growing business, but with changing client expectations around transparency and immediacy.

There had been some buzz on social media about a company called Perfect Portal, remembers Turner. Its tools enabled firms to provide immediate quotes to clients, in addition to automated updates for all parties, all the way through to completion. In October 2018, the firm invited them in to do a demo.

It was a perfect fit. "Within five minutes of them showing us the system, we knew we wanted it," says Turner. After a few months of building in documents and other information, and Perfect Portal giving on-site training, the system went live in March 2019.

In a short space of time, Perfect Portal has helped PCS Legal gain new business, and develop its 'new business' team. "It's also created other lines of work that we were unable to do before," says Turner.

WORTH QUOTING

The benefits of switching to Perfect Portal's quoting tool were immediate. "It's simple to use. It's helped us gain more business. And even if a client decides not to use us, the feedback that we get from the system is useful," says Turner.

PCS Legal relies on the reports and graphs displayed on the dashboard to inform everything from running marketing campaigns, through to changing the way it works. "The new business team can go into the system and see which cases we've lost, and why. They can also easily see which referrers we have given quotes to – but not converted yet – so that we can follow up for conversion. Our business intake has definitely increased since implementing Perfect Portal," says Turner.

One relatively small detail in particular has noticeably increased new business. "With Perfect

Portal, when someone clicks in to get a quotation, the system will ask minimal questions – name, phone, email, sale price, and, for example, whether the property is shared ownership," says Turner. The firm's previous platform had mostly mandatory fields – resulting in the firm losing quite a lot of business: "If you didn't complete the fields, you couldn't get the quotation. With Perfect Portal, the sale price field is mandatory, but if you leave out a phone number or a first name, the system will still provide a quotation," says Turner.

The built-in reminders and diary facilities have come to be indispensable for the new business team – who deal with 100–200 quotes a day, says Turner. They need to ensure that quotes are not missed. "The 'reminders' function automatically emails the team with a list of follow-ups. Previously, they had to log into the system, run a report, and put it into Excel. Not only does it save us time but it wins us more business," she says.

And with various parties involved in a transaction, at different points, efficiency (and collaboration!) has been vastly improved owing to Perfect Portal's integration with the LEAP case management system.

"The new business team used to put new instructions on LEAP manually. Now, we input these instructions onto Perfect Portal, and it pulls them into LEAP. Our conveyancers work on their cases in LEAP, so they can update the case tracker right there. The new business team and the clients go in via Perfect Portal. If you update anything, such as an email address, on LEAP, it syncs to Perfect Portal, and vice versa."

MORE REFERRALS

Perfect Portal's referrer app and platform not only helped PCS Legal get and manage referred business but win it much more quickly.

It's a fantastic selling tool, says Turner. "When we go out to new or existing referrers, we launch the system with them. Most of our referrers really like being able to log in and create their own quotes and structures," she says.

THE BRANDED CLIENT APP

PCS Legal had long wanted their own app to allow clients to track case progress, says Turner. Their experience with Perfect Portal's branded client app exceeded expectations – enabling the

ABOUT US

Perfect Portal is a business management system that enables legal professionals to take advantage of every opportunity through a fully-integrated and easy to use online platform.

www.perfectportal.co.uk





firm to gain a competitive edge.

The feedback has been “amazing”, she says. “Some clients simply like the layout. Others have mentioned the usefulness of the percentage bar that displays the progress of their transaction.” It’s also much easier to view critical information. When clients log in, they can get a copy of their quotation, and see the case handler’s details. If for some reason they can’t access certain documents, they can just go into the app.”

FORWARD-THINKING

Turner speaks highly of Perfect Portal’s availability, and immediate response to any issues that crop up: “Even if it’s just a simple question – such as the best way to set up a new referrer – they’re always on hand.”

Perhaps most importantly, PCS Legal now has the forward-looking quote platform they wanted back in 2018: “Perfect Portal is constantly developing the product. Every time you think ‘oh, I really wish it would do this’ – the next thing you know, they’ve built it into the system!” **LPM**



Perfect Portal is constantly developing the product. Every time you think ‘oh, I really wish it would do this’ – the next thing you know, they’ve built it into the system!

LPM FIRM FACTS

PCS Legal

Revenue: not disclosed

Corporate status: Partnership

20 fee earners, 120 total staff

Offices: Basildon, Wickford, Ongar, London.



5 MYTHS OF AGILE

George Bisnought, founder and managing partner at Excello Law, talks agile working and where firms might misunderstand what it actually involves

1 AGILE WORKING IS JUST A NEW TERM FOR FLEXIBLE WORKING
Agile working means empowering workers to anticipate and rapidly respond to changing business conditions, technological developments and client demands. It means more than just being able to work from home a day or two each week. It means empowering workers to creatively exploit opportunities in their area. It's true that agile working can be done at home, on the train, or in a hotel. However, the essence of agile working is not where it is done; it is the ability to service the clients of a business in a more creative, innovative and customer-centric way.

2 AGILE WORKING INVOLVES NEW TECHNOLOGY
An agile workforce cannot be purchased off-the-shelf. It requires the cultivation of a creative mindset in workers that continuously searches for innovative solutions to problems, and rapidly implements such solutions. Agile workers may utilise new technology, but that is

just one aspect of agility. Ultimately, agile working has to become part of an organisation's overall business culture.

3 AGILE WORKING IS CHANGE FOR THE SAKE OF CHANGE
Sometimes business makes the mistake of changing for change's sake. Planning for change has to be realistic and must make business sense. Businesses need to champion agile working as a fundamental part of their company culture. Introducing agile working may well change working practices but, more importantly, it requires new thinking in the workplace.

We've operated an agile working model from the beginning for over 10 years now. We've seen in the last three years a significant number of law firms bring out agile working policies. I sense some have been implemented for the wrong reasons and, anecdotally, we have spoken with solicitor candidates who were not aware that their firms had an agile working policy, even though it had been heavily publicised in the legal press.

4 ONLY SENIOR WORKERS AND MANAGEMENT NEED TO BECOME AGILE WORKERS

It is vital to include everyone, at all levels of the company, in a business's effort to be agile in order to achieve full benefit. Workers at all levels might have useful ideas as to better ways of working in their area. All workers should be invited to share their ideas. People can then take ownership of their work, which improves morale, employee wellbeing and job satisfaction.

5 AGILE WORKING SUITS EMPLOYEES, BUT IT WON'T HELP THE BUSINESS
Agile working should ultimately help to deliver the key objectives of the business by improving business efficiency, customer service and therefore profitability. It empowers workers by giving them flexibility and control — which improves quality of life and morale. This results in increased productivity, less absenteeism and greater staff retention, all of which ultimately benefit the business. **LPM**

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