

JUNE 2020

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LEGAL PRACTICE MANAGEMENT

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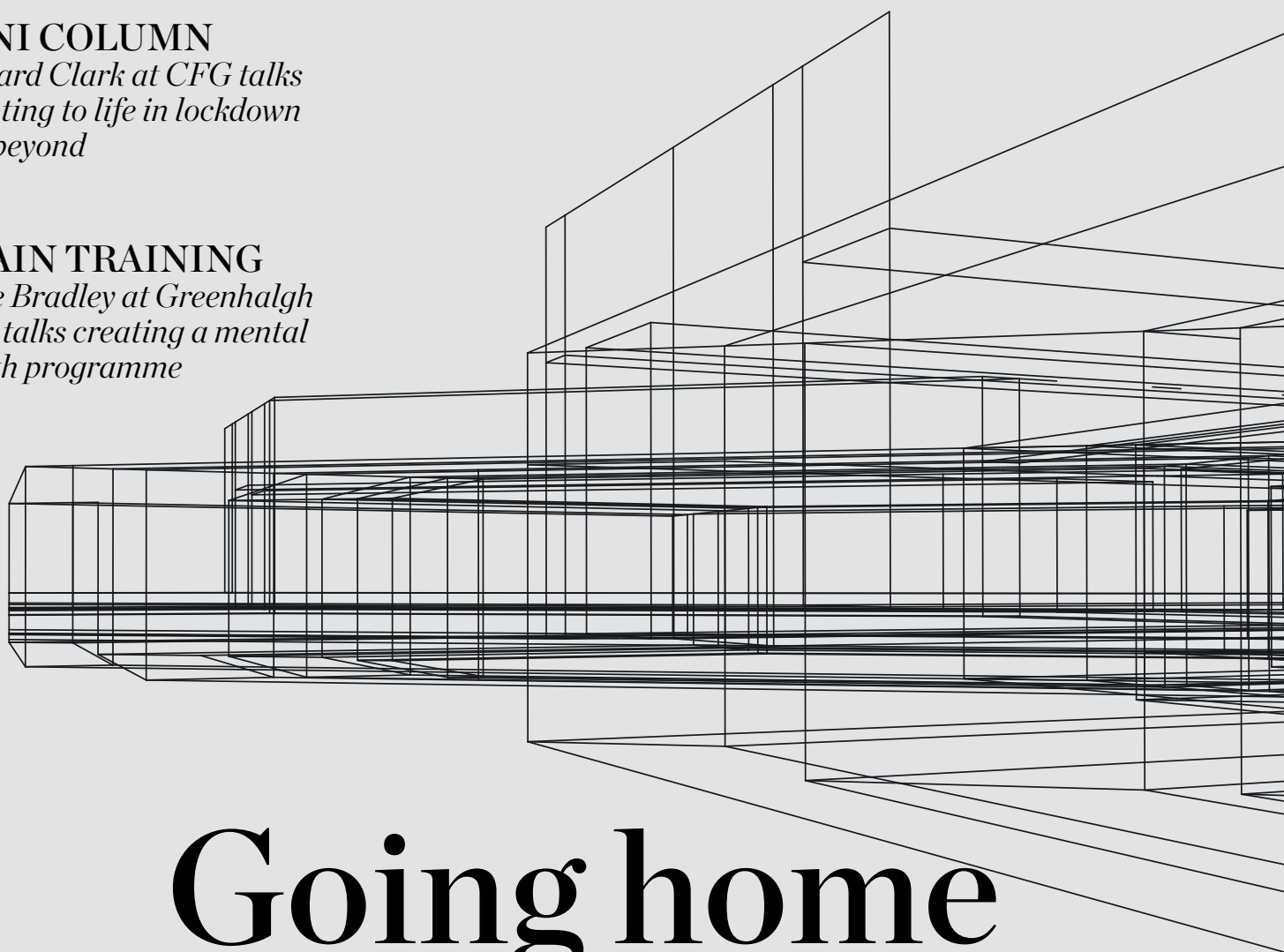
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## MINI COLUMN

*Richard Clark at CFG talks  
adapting to life in lockdown  
and beyond*

## BRAIN TRAINING

*Steve Bradley at Greenhalgh  
Kerr talks creating a mental  
health programme*



# Going home

*LPM takes a building inspection of the conveyancing practice area – what  
can other areas learn about its fittings?*

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# WELCOME

## About us



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The hot topic feature this month is a deep dive into the world of conveyancing. For those of you who don't know, or don't care to know, this high volume, low margin area of work – perhaps because your firm focuses on having a close relationship with your clients and 'how can a practice area such as conveyancing ever compare?' – let me just stop you there. Full-service firms and firms with other specialisms could learn a lot about the way conveyancers approach work – including having a client-first approach and leveraging technology to streamline processes. But don't don't take my word for it, take it from some of your peers and competitors starting on p17.

Also in this issue, read up on how Steve Bradley at Greenhalgh Kerr (shortlisted for practice director/manager of the year for LPM Practice Excellence Awards 2020) worked to roll out a mental health and wellbeing programme at the firm (p23).

There are some exciting things on the horizon for LPM, including more digital content and resources. Keep checking out our blog section at [www.lpmmag.co.uk/lpm-blog/](http://www.lpmmag.co.uk/lpm-blog/) to find more up-to-date releases of stories from others in UK SME legal practice management. And as always, don't hesitate to drop me a line with any insights or suggestions on topics to cover. Thank you to those who've reached out already – more to come online this month!

Kayli Olson, editor  
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# A LOOK AT LOCKDOWN

Richard Clark, CEO at CFG Law, discusses the realities of lockdown and how the importance of being able to adapt to new ways of working, quickly

Lockdown – I don't think anyone saw this coming a few months ago. Our world turned upside down almost overnight.

No-one has faced a bigger challenge than the NHS and care sector, who deserve our thanks in this unprecedented time. But for businesses, this has been a genuine test of continuity planning and business culture.

We'd already decided before this period that we wanted our colleagues to be able to work remotely. It's what our people and our new recruits had said, and so we had heavily invested in the technology.

So, when the government first said 'work from home if you can', it was an easy decision for us. The next day, we settled our first case working digitally. By the time lockdown was officially confirmed a week later, we'd got everyone settled into their new routines.

And we genuinely haven't looked back. FaceTime, WhatsApp and Teams meetings are our

new normal. We've established daily communications to keep people updated and daily digital team meetings to keep people talking to each other.

We're in regular contact with clients and their families. They're some of the most vulnerable so we're determined to help ease their isolation. And we've carried on working with our charity and other partners to support them. In every sense, it's been business as usual. Our team has really pulled together.

But sadly, we know some firms have struggled and heard numerous examples of businesses not being able to work from home or having to furlough staff, something which thankfully we haven't had to do.

In many areas, the legal sector has been slow to adapt to new technology, overly reliant on paper and bums on seats. Already, we know of firms looking to move work-in-progress books on and I think we'll soon see more of that. I hope the interests of the client remain paramount in any transactions that materialise.

Of course, any hardships are nothing compared to the horrendous loss of life we've seen but we think the past few weeks will change working life forever, including the law.

And why not? We're all now used to video conferencing. When we emerge from this period, people will expect to work differently.

Now is not the time to stand still or look backwards to how things were. Those who adapt fastest – becoming truly digital law firms – will be the successful ones. We intend to be among them. **LPM**



*Sadly, we know some firms have struggled and heard numerous examples of businesses not being able to work from home or having to furlough staff, something which thankfully we haven't had to do*

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*Often, end users are suddenly provided a completely different way of working and forced to comply for the benefit of the firm*

# Working workflows

GARY SHAW, THE LEGAL WIZ

As everyone knows, conveyancing is an area of legal work under immense pressure. Margins are squeezed by non-local providers offering low cost remote conveyancing, while the stakes are high from a risk and compliance angle due to rising indemnity premiums. The rising solution we've seen in the legal industry seems to lie in automation and efficiency savings through better use of technology – which leads us to wonder, as firms and their chosen suppliers have been implementing conveyancing case management systems (CMS) for over two decades, why do so many firms struggle with these projects and why are the results so mixed?

Most of the CMSs integrated with practice management systems on the market provide a framework, or development platform, for the firm to create a customised case workflow for each work type. This involves the firm designing the scope and specifications for the workflow and then programming that into the CMS. Even those with 'out of the box' workflows require a great deal of set up and configuration. An average of a nine to 12-month timescale for the delivery of conveyancing workflow projects are not unheard of!

However, most firms fail at the initial stage – striving to create 'catch all' processes resulting in lengthy and overly complicated flows or failing to assign the right levels of resource to the project. Additionally, programmers will work by the specifications laid out in the design and flow documents – they don't understand the user practicalities or legal implications of a process. A fatal mistake made by firms implementing a new system is that end users, such as fee earners and secretaries, are usually left out of the process. Often, they're suddenly provided a completely different way of working and forced to comply for the benefit of the firm. Is there any wonder that the firm faces resistance and complaints from users that the system is slowing them down?

SME firms that can't afford to make the

mistakes their larger competitors have made. They must step back and assess not only the type of automation they have in place (if any), but also their workflow method to ensure it's successful.

There are effective CMSs and workflows available in the market that can provide an efficient, easy-to-use solution by automating mundane tasks such as the generation of standard correspondence, and integration with HMRC or Land Registry to speed up the data input requirements. You can also have prompts and reminders within a workflow to ensure that key actions or dates are not missed, mitigating the high-risk elements of this type of work.

To avoid any miscommunication, we strongly urge your firm to engage the end users in the early design process – what do they want from the system, how can it make life easier for them? Early user buy-in will result in less resistance when the workflows go live. Also, consider a phased approach to the workflows. Initial releases providing the basic stages of a complete workflow and then the later ones expanding on specific processes. This approach allows users to familiarise themselves with the system without feeling overwhelmed by a 'big bang' approach. Having used it in a real-life scenario will help when it comes to improving on the processes over time.

Lastly, keep it simple. Resist the urge to create 'catch all' processes that create too many prompts and result in lengthy processes, which end up creating inefficiency – the opposite aim of a workflow!

The future of conveyancing has been changed as the current Covid-19 environment has compounded the shift from paper-based and even email-based correspondence with conveyancing clients to more of a modern, online approach. It's therefore more important than ever that firms have a fully functioning CMS, especially those in conveyancing. SME firms can profitably survive in this marketplace, as long as they embrace the technology trends of the general populace. **LPM**

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*Maintaining presence is key so that you are front of mind with your clients when they're ready with their next instruction or to send a referral your way*



# Relationship intelligence

BRIAN COVENTRY, THE DATA OPTIMISER

It's impossible to predict the extent or impact the Covid-19 pandemic will have on professional service firms, and more broadly, businesses and your clients, in the long term.

Now, more than ever, clients need their lawyers to bring them through the uncertainty and navigate complexities, manage risk and protect assets. Or to simply be there to listen.

Nurturing and guiding clients is undoubtedly your paramount focus right now. Maintaining presence is key so that you are front of mind with your clients when they're ready with their next instruction or to send a referral your way.

What's important is being able to monitor, manage and report on client interaction – but how can this be achieved accurately and simply?

Here, we take a closer look at how (using Client Sense) a data-driven approach to identifying client relationships will provide the visibility needed to leverage a new strategic capability:

**Client care and management** – Ensure contact with your key clients and referrers is maintained. Rest assured that you and your team, even when working remotely, know who is in contact with whom and that your existing relationships are secure.

**Managing internal staff changes** – In the event of a planned or unplanned unavailability of an employee, quickly identify external relationships most likely to be impacted. Then identify who else in the firm knows the same contact and may be able to maintain the client or referrer relationship.

**Identifying external staff changes** – Be aware of staff changes on your client side that may impact your ongoing commercial relationship. Our Client Sense platform can identify these external contacts. Acting on this information can help you to protect the client relationship before it strays. You can also leverage this knowledge

and act quickly if an external contact changes organisation. This potentially opens a new and welcome opportunity for the firm to engage with the contact at the new organisation.

**Targeted cross-servicing** – Cross-servicing or cross-selling is of the utmost importance. You're likely to have one or more groups that have slowed down significantly, yet those groups will hold relationships into businesses that could and should benefit from the sought-after areas of your firm. Client Sense quickly identifies these opportunities based on prior contact. It then assesses the best contact internally to make an introduction and identifies where these beneficial introductions have and have not been made.

**Strategic, industry-focused prospecting** – Focusing on a particular industry enables you to provide what clients are looking for right now – expert advice, knowledge, insights and understanding of their situation. You and your team are seeing first-hand the issues and complexities businesses are facing within certain industries. It's crucial to leverage this insight to find new, industry specific clients. Clients want advisors who know their business and understand industry nuances.

Into the future, the visibility that Client Sense automatically provides allows for an entirely new strategic capability. With real-time communication information and 360-degree relationship mapping, you and your firm can perform much more strategically to increase and maintain revenue.

Don't let the pandemic define you and your firm. Together, let's propel you forward, armed with client data insight to manage key relationships, explore business development opportunities and most importantly, maintain revenue. **LPM**



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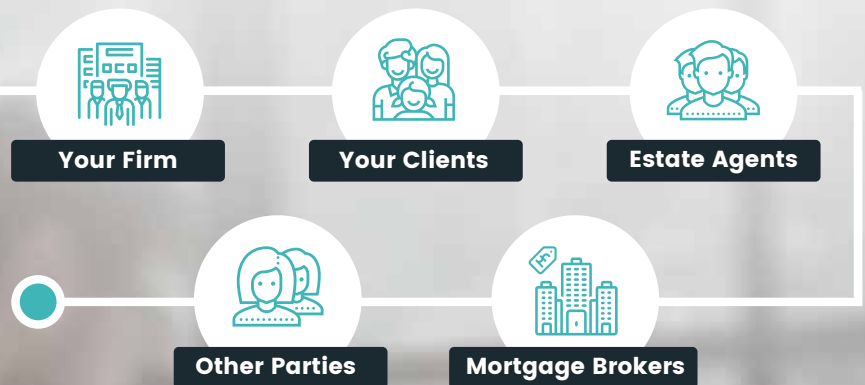






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*Businesses must start thinking carefully about the post-lockdown future and the steps needed now to ensure employees feel safe and able to perform at work*

# Back to business?

NICK HAYNE, THE DATA MASTER

Although technology played a pivotal role in ensuring many organisations could continue to operate successfully with a remote workforce, when the worst of the Covid-19 crisis passes, a return to the traditional office is still likely to be expected, at least in the short-term.

Proactive businesses should now be considering what changes in the workplace will enable a safe working environment for the return of a workforce that may be reluctant to return until they feel confident that they're safe among colleagues and visitors.

Among the steps due consideration are:

**Workspace audit:** The absence of employees makes it easier to understand the changes needed for employees to work safely, while maintaining the recommended 2m physical distancing. Fixed workstations, entrances and exits to rooms and communal spaces may all have to be reconfigured to enable the free and safe movement of employees.

**Safe working:** Create a safe working policy with your employees, who will be well aware of the latest government advice and expect to see this reflected at work. Agree rules on distancing, hand washing, group meetings and so on, with a top-down approach to assure employees that all levels of the business understand the new reality and are working to make it achievable.

**Safety measures:** These might include screening for temperature, easy and quick access to hand sanitizers, staggering the working week for employees so that fewer are present in the office at any one time. The same can be done with lunch and rest breaks throughout the day, and meetings should take place electronically wherever possible.

**Physical changes:** Fit no-touch options for doors, taps, waste receptacles and so on, and

where possible use automated or digital assistants when dealing with repeated administrative tasks, to minimise one to one contact.

**Protective equipment:** Some employees may request personal protective equipment like masks, gloves, face shields, and so on, and by the time the lockdown is lifted, wearing such equipment may be compulsory. To maintain the spirit of togetherness, it will probably be wise to provide, within reason, whatever protection is requested and ensure people understand its safe use and disposal.

**Public screen:** If your business involves direct contact with the public, via reception for example, then consider fitting screens to protect employees stationed there, while arranging the seating to allow social distancing to be maintained.

**Clean desk:** Make it easier for all surfaces to be thoroughly cleaned every working day by asking employees to leave their desks free of any personal possessions or clutter.

**No drinking:** The office coffee machine or water dispenser should be removed for the immediate future, as they represent higher risk areas for the transmission of infection.

**Plain sight:** Ensure hand sanitizer isn't just available but is placed in full view of all employees, to help foster an atmosphere of mutual trust and a spirit of togetherness.

**Remote ready:** Be prepared for further lockdowns, by assessing what worked well and what could work better when next your people choose to work remotely, or you're forced into another similar situation.

Businesses must start thinking carefully about the post-lockdown future and the steps needed now to ensure employees feel safe and able to perform at work. It these businesses that will be best placed to not only emerge successfully from the crisis, but flourish. **LPM**

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*As always, the future success of firms hinges on their ability to adopt to new ways of working*

# Electronic evolution

ALEX WILLIAMS, THE TECHNOLOGIST

don't think it comes as a surprise that the current pandemic has caused us to dramatically change the way we work, the way we engage with not only our peers but also our clients. It's probably fair to say that this journey had already started but the rate of change has been escalated due to Covid-19. Consumer behaviour changes as the offering in technology changes – whether that's a new smartphone or a new VR headset, it changes how we begin to communicate with one another.

As millennials increase their presence in the market, the conveyancing process is becoming increasingly digitalised. The changing dynamic of homebuyers has resulted in a higher demand for more modern processes. So where can we expect conveyancing to go in the future? And what does it take to be a successful conveyancer in the new digital era?

There's already a lot of readily available technology that improves the speed and transparency of conveyancing. They allow for traditionally laborious operations to be automated, electronically delivering documents or information via emails, online portals and apps. Clients can review updates and data relating to their case easily – while staying informed every step of the way. For technology like this to be effective, it requires all parties to adopt it, not just solicitors. Clients, landlords and councils must also be online – and digital adoption in conveyancing seems patchy at present.

Most organisations and individuals seem to be improving however, with experts forecasting that by 2030 the entire

conveyancing process, including purchasing a home and all surrounding documentation, will be digitalised. It's important for all of us to keep up with this predicted trend, listening to the wants and needs of the new demographic of homebuyers. We know these people want effective, fast communication because they're so accustomed to receiving answers on demand. We know they don't want communication through lengthy letters or emails anymore.

Case management tools, automated client update services, mobile applications and search ordering platforms can help to meet these expectations. Electronic signatures (now confirmed valid by the Law Commission) have also provided a means of obtaining documents from clients in an extremely efficient manner, potentially saving weeks of time not having to wait for postage, signing and scanning. This then frees up the conveyancer's time to focus on the service and advice they provide.

As always, the future success of firms hinges on their ability to adopt to these new ways of working. Speaking from my own experience, the location of the law firm did not matter to me because we had means to communicate that didn't require physical presence. I purchased a house on the south coast while my conveyancer was based in Grantham, over 150 miles apart. The level of service and personal touch is something that now gives firms an unique selling point. By using technology to digitise tasks and streamline processes to give a tailored solution is a determining factor on whether a firm is used or not. **LPM**



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A close-up photograph of a person's hands applying a white adhesive bandage to the back of their left hand. The bandage has several small white dots on it. The background is a blurred desk with papers and a pen.

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## FEATURES INDEX

# CONSTRUCTING CONFIDENCE

## 17 FEATURE

## Homework report

LPM's hot topic feature looks at the lives of conveyancing – what can other practice areas learn from the way it works? Kayli Olson reports

## 23 BRAIN TRAINING

## Think healthy

**Steve Bradley** at **Greenhalgh Kerr** on creating and rolling out a workplace wellbeing programme



# Homework report

LPM's hot topic feature this month focuses on the conveyancing world to find out what other practice areas can learn from the way it works. Kayli Olson surveys the scene

Professionals in the legal sector often want to hear about what other industries are doing in terms of strategy, innovation, process efficiency and so on. But what about having a closer look at the inner workings of certain practice areas?

Conveyancing is one such area – with its particular requirements around risk and compliance, use of technology, and understanding of law and client demand – that could shed light on ways other practice areas can or should adapt.

Alison Roberts, professional services director at conveyancing specialist firm Countrywide Property Lawyers, says land law hasn't changed much over the years, but conveyancing has become more complicated. "Lenders' requirements are stricter and more numerous. Stamp duty land tax is more complex than it used to be and demands specialist knowledge. And clients now expect instant and frequent communication in ways that best suit them."

Countrywide Property Lawyers has long since moved its focus firmly on to the customer, she adds. "They, rightly, take the quality of legal work for granted. Legal work is the minimum they expect, so the only way we can differentiate ourselves is by giving the customers the best experience we can."

"Clients don't really measure law firms against other law firms, we're judged based on the everyday products and services they use."

Stephen Ward, director of strategy at the Council for Licensed Conveyancers (CLC),

agrees: "Changes in consumer expectation is a key driver in the way conveyancers work and why they have evolved. Clients increasingly expect service from a conveyancer to match the kind of experience they get with other service providers like Uber and Amazon."

Roberts adds: "I didn't always appreciate the difference between customer service and customer experience – but now we measure ourselves against as many standards as possible, including speed of transaction and net promoter score. We try not to be complacent."

"We don't always get it right – firms that never make mistakes don't exist – but we empower our lawyers, who earn a bonus for customer satisfaction, to do whatever it takes to make it right for the customer."

## IN THE WORKS

Ward at the CLC says conveyancers may be very attuned to client demand, but there's still a lot more that can be done. "There are already many things that firms can do to better the customer experience and improve and streamline the conveyancing process."

"Sometimes there can be a reluctance to move away from comfortable, longstanding ways of working towards new ones – which can be more secure, less open to fraud, certainly faster and reduce the time spent doing admin to free up the advice-giving part."

Indeed, managing client expectations can feel like a juggling act. Tamara Dhesi, head of conveyancing at Smith Partnership, says



residential conveyancing is always fast paced. "You need to manage your clients' expectations as well as those who refer you, such as agents and developers."

Dhesi says conveyancing is very much a niche in terms of time pressures and deadlines. "Other departments don't necessarily have the same pressure from time constraints and client demand that we do. Clients often want to be moved within days. However, there are important legal checks that need to be undertaken in order to protect our clients' interests prior to being able to proceed. Due to the fast-paced nature of conveyancing, a good workflow is incredibly important."

"I'm currently evolving our workflow to make it more streamlined and efficient so we can maintain a good pace and level of service. Having a workflow also brings structure to the conveyancing process. People naturally work in different ways and, without a workflow, it can be difficult to maintain that pace and meet client demand if you have to pick up someone's work if they're away."

Guy Setford, co-CEO at Setfords Solicitors, says conveyancers are not only more efficient when it comes to the practical steps needed to complete a purchase, but they're better at what's often the most important service of all: offering much-needed advice.

"Should you wait while a seller seeks retrospective planning permission, or should you go with an indemnity policy? Should you be concerned about the covenants on the title? The ability to make the right calls, quickly, is often the difference between the make or break of a sale. And that ability is more developed when you have years of experience behind you."

Managing high volume takes a lot of work, says Roberts at Countrywide Property Lawyers. Naturally the firm has evolved its processes to find out what works best, but that also requires the talent to back it up.

"Generally, we want a well supported property lawyer to take personal responsibility for the client, and who can delegate administrative tasks like file opening and post completion. We find many advantages in working in small teams, especially to manage calls, but the property lawyer is key."

To manage volume well, she says, you need to

give your lawyers a good case management system (CMS) and your managers access to good management information and customer service tools. "But a first-class CMS is no good if you don't have the experienced lawyers to carry out the legal work and make the decisions."

Setford adds: "Technology and efficient systems play their role, but the truth is, no firm can expect to deliver a quality service if its lawyers are overloaded with transactions. The right number of clients for the right number of lawyers means the right level of service. That brings customer satisfaction and that ultimately means you grow your business."

## PROPERTY RISK

Conveyancing is naturally a high-risk area. Dhesi at Smith Partnership says you have to have a good eye for detail. "Despite having the push from clients, I'm always conscious that we still have to do our job, legally. You also need to recognise that they're investing a lot of money, and it's our job to protect that money."

Full-service SME law firms will be familiar with the recent changes to accounts rules by the Solicitors Regulation Authority with the aim of protecting client monies. The next big change to impact CLC-regulated firms is also around accounts rules – changes set to come at the end of 2020 will allow conveyancers to use third-party managed accounts, and deal more easily with aged balances up to £50.

The CLC has a unique regulatory model, in that it provides "assisted compliance" to the firms it regulates, Ward explains.

"What we want to do as a regulator is to try to get ahead of how the market is going to develop – what tools are going to be used and the



*Due to the fast-paced nature of conveyancing, a good workflow is incredibly important. I'm currently evolving our workflow to make it more streamlined and efficient*

Tamara Dhesi, head of conveyancing, Smith Partnership

### LPM FIRM FACTS

**Countrywide Property Lawyers**

**Revenue: £13m**

**Corporate status: Ltd (ABS)**

**Offices: Manchester, Cardiff**

### LPM FIRM FACTS

**Smith Partnership**

**Revenue: undisclosed**

**Corporate status: LLP**

**Offices: Derby, Leicester, Burton-upon-Trent, Stoke-on-Trent, Swadlincote**

### LPM FIRM FACTS

**Setfords Solicitors**

**Revenue: £13.5m**

**Corporate status: Ltd**

**81 fee earners, 269 total staff**

**Offices: Guildford, London and 17 meeting room facilities nationwide**

### LPM FIRM FACTS

**Ellisons Solicitors**

**Revenue: £16.3m**

**Corporate status: Partnership**

**120 fee earners, 237 total staff**

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

## Locked out?

How hard was conveyancing hit by Covid-19? Louise Godfrey, conveyancing partner at Ellisons Solicitors, says: "Whether it's a seller concerned they won't be able to get their property on the market or a first-time buyer worried their milestone first purchase will be delayed or fall through, many parties have questions during this uncertain time."

Roberts at Countrywide Property Lawyers says: "We wondered if the housing market would just freeze, and if clients part way through transaction would want to just hunker down and wait for lockdown to end."

"After the first few days, we realised that many customers still wanted to progress their transaction even if they couldn't physically move in – so we spent a lot of time getting to grips with government guidelines and working out what we could and couldn't do."

Like all responsible businesses, she says, the first priority was to keep staff and customers safe.

Setford at Setfords Solicitors agrees: "Ensuring their safety has been the priority of everyone in the conveyancing sector and we're proud of how the industry has

reacted."

He says the market did slow for a bit: "But it was our experience that buyers and sellers didn't walk away, they simply put things on hold. As soon as restrictions began to ease, transactions very quickly started up again. Our conveyancers had everything in place ready to press go as soon as it was safe to do so, and that's exactly what they've done. We've been very encouraged by the bounce-back and, providing it's safe to do so, we're looking forward to assisting thousands of people to move home in the coming months."

Roberts saw a similar trend: "Our existing pipeline of cases held up very well, and although new instructions in April and May were much lower than usual, we're already seeing renewed interest following the easing of the lockdown in England."

Godfrey at Ellisons Solicitors says: "This is good news, of course, but there may be a more deep-rooted lag to the market. The impact of which will become apparent in the coming weeks and months particularly for the first-time buyer market, which is an area where we've received a very high number of queries." **LPM**



*By having a digital onboarding process that's easy for clients to use and provides high quality and reliable information you can make vast improvements to the rest of the service*

Stephen Ward, director of strategy,  
Council for Licensed Conveyancers

opportunities and risks around them.

"We don't want to sit back as firms make more developments using technology, only getting involved if things go wrong. It's our job as a regulator to be the guiding light and provide them with the confidence they need as they modernise the way they work."

As firms adapted to life in lockdown, the CLC released guidance around dealing with conveyancing during Covid-19 restrictions – with the virus adding new limits to the amount of work conveyancers can undertake, it also put more pressure on firms' anti-money laundering (AML) and ID checking. The CLC has kept a close eye on conveyancers' investments in technology and also released detailed guidance on digital ID verification.

Roberts says AML obligations have become more detailed and complex – identification of clients, especially those not seen in person or non-UK residents, can be a challenge, as can establishing the source of wealth to fund transactions. "Properties that are empty and mortgage free are particularly vulnerable. Some frauds are easy to spot – odd sentence construction in emails for example, but others are much more sophisticated.

"Cybercriminals monitor email exchanges between customers and conveyancers, waiting for an opportunity to hack into the client's account to try to divert funds. We try to stay one step ahead, but fraudsters are always looking for their next opportunity."

Historically, like most conveyancing professionals, Smith Partnership requested that clients come into the office with their ID. "That was the ideal," says Dhesi.

"We have clients that are on the other side of the country, and obviously now that we're working remotely, we've had to adapt our ID-checking process."

She's asking that clients either visit a doctor, bank clerk or post office to get their ID certified. And if they can't do that, Smith Partnership offers enhanced ID checks: "They can scan their passport and we can run it through an AML provider's website."

Ward sees many firms still relying on face-to-face identity checks. "Luckily, more firms are moving to digital ID checking and verification tools. It overcomes the problem these days of social distancing, but, for the longer term, it genuinely enables the firm to deliver a much smoother and faster onboarding process for clients."

"Getting that initial paperwork from clients can create big delays in the process – if you can crack that by having a digital onboarding process that's easy for clients to use and provides high quality and reliable information then you can make vast improvements to the rest of the service."

And, he says, it's not just at the start of the process that face to face, or paper processes, linger. "Title deeds still need to be signed and witnessed – again a challenge in times of social distancing. Key players across the home-buying



and selling industry are working on that problem though.”

Setford at Setfords Solicitors says electronic signature services are among the tools the firm uses to reduce the need for human contact and the printing and posting of documentation. In fact, he says, the growing use of technology across the industry during the pandemic will ultimately lead to speedier transactions for everyone.

## HOUSING TALENT

There’s a talent opportunity that conveyancers are missing out on, Ward says – and it’s about diversity. “There are many women business owners in the firms we regulate, and the lawyers are overwhelmingly women, but career progression for women in the sector is not what it should be. And career progression for black, Asian and minority ethnic individuals isn’t what it should be either.

“Our research shows that firms could do more to make sure they’re recruiting and retaining the best talent, which naturally comes with a diverse pool of people.”

He says diversity is also part of consumer expectations. “Consumers respond better to organisations where they can see themselves reflected – where people from their background are present.

“It may seem like a long way from the core business of conveyancing, but there’s a war for talent in the legal sector and it’s important that conveyancing firms recognise the importance of recruiting the best talent from all backgrounds. It’s now well understood that diverse and inclusive organisations tend to be more successful.”

Roberts agrees. Like many law firms, Countrywide Property Lawyers struggled to recruit the number of experienced lawyers it needed, so the firm developed its own training academy in 2014 and has been refining it since – which won the firm the Princess Royal training award in 2019 in recognition of the programme.

“We’ve learned to be as flexible as possible with the recruitment process – graduates can be great and learn fast, but some of our best people have come from less academic backgrounds and it’s great to see them flourish with the right support.”

## FURNISHED FUTURES

We’re on the cusp of the next stage in the evolution of conveyancing, Ward at the CLC says. “Conveyancing is all about gathering reliable, trusted data on property being bought and sold, and making sure that consumers understand that data. A lot of data about properties doesn’t change from one owner to the next, and the data



*We’ve learned to be as flexible as possible with the recruitment process – graduates can be great and learn fast, but some of our best people have come from less academic backgrounds*

Alison Roberts, professional services director,  
Countrywide Property Lawyers

that does change could be made available in real-time.”

He says the Land Registry’s Digital Street project showed what was possible. “It’s very easy to envisage how an Amazon-style one-click purchase could work for property once information is made available at the outset. A lot more information could be posted online by estate agents. So potential buyers could see not only all of the information around local schools and such but they could see information on planning, flooding, safety certificates, check when the boiler was repaired or if there are any restrictions related to the property that might stop them running a business there, and so on.

“That being said, I don’t think that a consumer would then proceed to buy a property at a click of the mouse. I think we’ll all still want to walk around and see the place before committing. Plus, they want someone who’s experienced in property transactions to really guide them through the process and interrogate what it is they want from the purchase and whether the property is really right for their needs.”

Roberts at Countrywide Property Lawyers adds that innovation in data is already making its way into the conveyancing process. “We use texts, email, portal updates and web chats as a matter of routine, but sometimes, particularly when things are fast-moving and building to an exchange, customers just prefer to talk to their lawyer direct on the phone.”

Dhesi at Smith Partnership agrees: “Of course, you’ll have some clients that insist on working in the old-school way and will want to come into the office. And we will always accommodate.

“But the way forward is digital. Everyone is so busy these days, being digital and offering a digital service is a must. Firms will need to move forward with technology and really utilise it to the fullest, while at the same time ensuring there are safeguards in place to protect the client and the firm.”

Ward says the next big thing for conveyancers is to increase automation and digitalisation. “We’ve seen firms automating processes where possible for years now, but conveyancing still isn’t digitised yet.” **LPM**

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# Think healthy



Steve Bradley, practice manager at Greenhalgh Kerr Solicitors, on the steps he took to get a workplace wellbeing programme up and running

We're a specialist debt recovery practice in Wigan, Greater Manchester, and have enjoyed rapid growth since I joined in January 2019. Our clients are primarily asset finance and leasing lenders, and local authorities. We represent dozens of councils throughout England and Wales, using market-leading expertise in defeating the tactics used by businesses to avoid payment of their non-domestic rates.

Fortunately, we didn't have a stressful or unhealthy environment to start with – but like all busy law firms, our hardworking team are under pressure to get results, hit targets, manage client relationships and achieve compliance. I've found that in every law firm, the culture of the business starts at the top and cascades down. The personalities, attitudes, motivations and behaviours of the partners or directors shape the mood of the workplace – and its people.

With a healthy collaborative structure and open-door policy, at Greenhalgh Kerr we aim not to be a traditional law firm. The directors were supportive of a programme that would build a culture of maintaining and increasing our wellbeing. We don't intend to preach about how you should live – just to support our people in reflecting on their health at work, recognising simple steps to improve their wellbeing, and encouraging colleagues to 'think healthy'.

## WORK WELL

We launched the programme with the implementation of new policies, adding the wellbeing agenda to our employee handbook. This covered healthy eating, smoke-free workplace, physical activity, alcohol and substance abuse, and mental health. We displayed posters around the office offering guidance and inviting self-awareness. We also provided signposting to external resources for professional or charitable support, should colleagues wish to seek this privately.

Mental health has become a 'cause célèbre' in our sector and rightly so, with legal

professionals identified as being among the most at-risk workers in terms of work-related stress in the UK workforce. We had mental health awareness training delivered in-house, and introduced staff to the good work of LawCare, which promotes and supports mental health wellbeing in the legal community.

Encouraging physical exercise, our office renovations included the provision of shower facilities for staff, enabling running or cycling to work. Colleagues took the initiative and formed an office running group for a weekly jog straight from the office and are signing up for a local Running Festival.

The renovations also provided a bigger kitchen and dining area. This led to the creation of a lunch club, with staff taking turns to bring lunch in for the group and exchanging healthy recipes. Fresh fruit is provided in meetings and colleagues have reusable plastic bottles to help them drink plenty of water during the day. Another seminar delivered in-house, on nutrition and healthy eating, invited us to identify our bad habits. The message was that the key to losing weight (for those looking to do so) is to achieve a calorie deficit, but to do that you must first reflect on your eating and exercise habits to see where you can make changes that you will stick with.

We offered every colleague a biometric health check. This is a private appointment with a visiting nutrition and exercise expert during the working day – using markers to indicate biometric health. It gave our people a snapshot of their health status using the following measures: blood pressure, body mass index, body fat percentage, cholesterol screening and lung function peak flow. Staff could take away their individual report and risk rating, which was of course strictly confidential. It simply gave us another opportunity to reflect on our wellbeing, and to identify ways of improving our health.

## ACHIEVING WELLNESS

Participation in our workplace wellbeing initiatives is entirely optional and done with the

### LPM FIRM FACTS

**Greenhalgh Kerr Solicitors**

**Revenue: £1.5m**

**Corporate status: Ltd**

**24 total staff**

**Offices: Wigan**





intent of being supportive. Those who don't wish to engage, or are unable to do so, are not criticised, judged or disadvantaged in any way, but the takeup is high among staff.

Having undertaken this journey, we then invited an assessor from Health at Work to measure our progress against the standards of the Workplace Wellbeing Charter. There are three levels of accreditation: commitment, achievement, and excellence. In the eight categories of assessment, we were at 'achievement' in six of them and 'commitment' in two – a great result at the first attempt.

The feedback showed that here at Greenhalgh Kerr, we're committed to ensuring the health, safety and wellbeing of our employees. We evidenced many examples of good practice and our systems go some way to improving the health of our team. Additional strengths identified included supporting employees during times when they have challenging personal issues, and regular social events.

"It was refreshing to observe such a vibrant workforce, which embraced wellbeing from the inside out" said Declan Doyle from Health at Work. "Having the added value of committed leadership means the journey can only get better."

Other businesses assessed by Health at Work

include Virgin Atlantic, United Utilities and Everton Football Club. As we celebrate our 20th anniversary this year, we're working on ideas to further embed workplace wellbeing at Greenhalgh Kerr. This will include more sporting activities for staff and the encouragement of cycling, for example.

With work-life balance and staff benefits becoming ever more meaningful as part of your recruitment and retention strategy, I would urge practice managers to engage with a workplace wellbeing programme. It will support a healthy office culture, encourage informed healthy-lifestyle choices, and improve your standing as an employer of choice. **LPM**

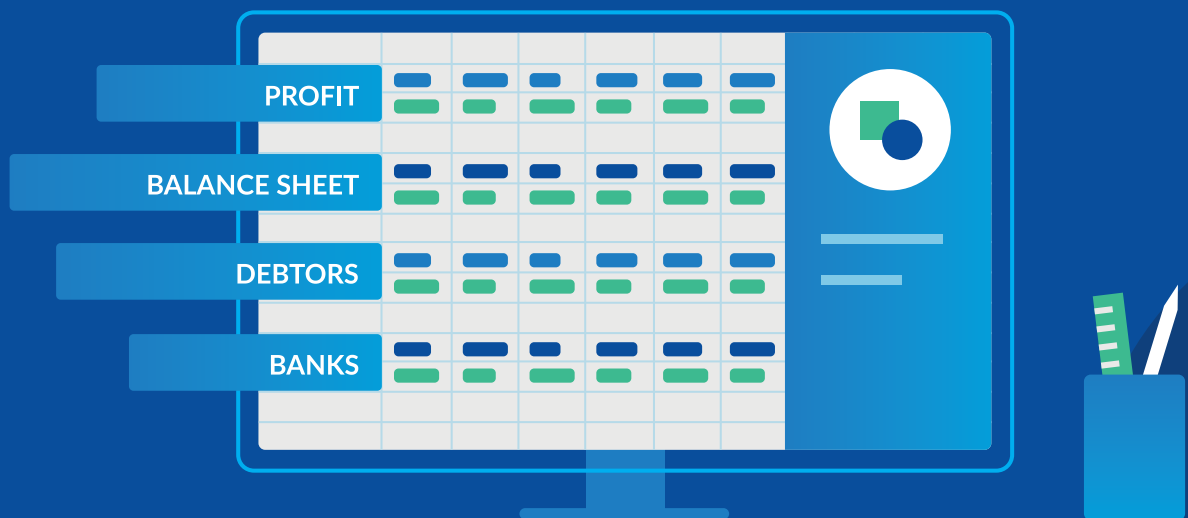


*Mental health has become a 'cause célèbre' in our sector and rightly so, with legal professionals identified as being among the most at-risk of work-related stress in the UK workforce*

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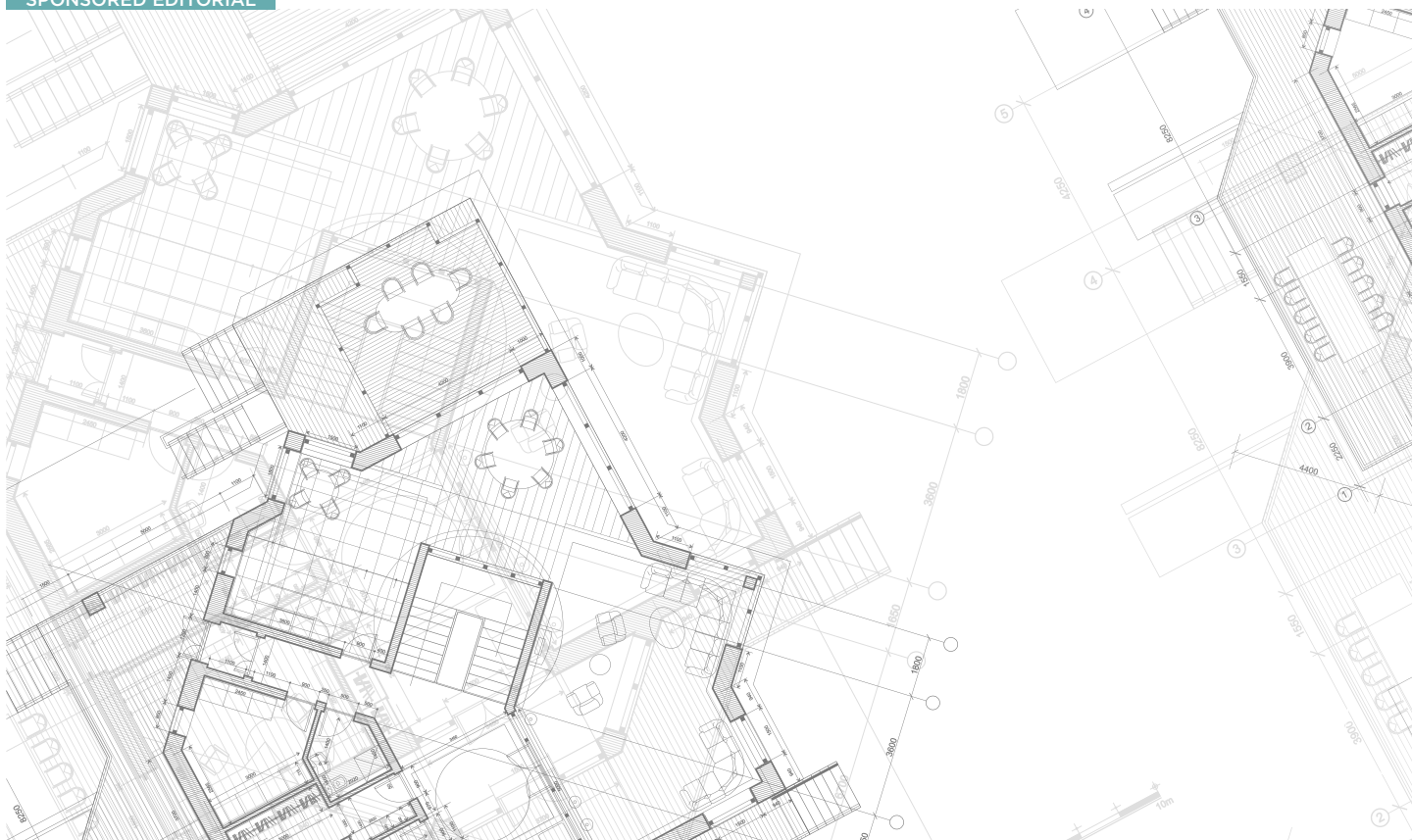
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# TURBULENT TECH

Technology use in law firms has changed dramatically in recent years, and even more so over the past couple of months. Adam Bullion, marketing manager at InfoTrack, offers a few thoughts on how conveyancing law firms can use tech to adapt

When Adam Bullion joined InfoTrack in 2015 as general manager of marketing – just a few months after the conveyancing services software company was founded – his career trajectory had included working for some of the world's biggest marketing agencies.

But it was his stint at Auto Trader that solidified his belief in the transformative potential of technology; he saw first-hand how the car advertising magazine successfully transitioned from a publication-based product to online. "Auto Trader used technology and data extraordinarily well in order to provide dealers with tools that told them which cars were good and which would sell more quickly."

It was a stark contrast to what he saw when he entered the legal market – particularly conveyancing. "The conveyancing market lacked any real innovation and technology to make processes faster. And it wasn't particularly enjoyable."

But if lack of innovation and creative use of technology were issues for the legal sector five years ago, Bullion thinks that firms can no longer afford to take this approach given the unprecedented upheaval happening in 2020.

## TRICKY TIMES

From the vantage point of December 2019, there was already a fair amount of what could be termed economic, social, and political upheaval before the pandemic hit in 2020 – certainly enough to cause a headache for your average law firm.

Bullion spent most of 2019 talking to his law firm clients about the dangers of a potential recession in 2020 and the factors that could play a role. "If I think back to last year, we had Brexit on the table, and it was a real unknown. We also had the uncertainty around the political spectrum in terms of May and Johnson, and then the general election. So, it was an unsteady time last year, anyway."

To make some sense of it all, he closely tracked two key market indicators: the Consumer Confidence Index, and the new car market. "Consumer confidence decreased rapidly last year from July to December. And the new car market – a good indicator of whether people are spending money – declined too," he says.

And when looked at in conjunction with other economic indicators such as the housing market, Bullion says that we were always on the cusp of a recession.

## 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](http://www.infotrack.co.uk)



But he thinks that the onset of Covid-19 will only hasten us into that recession – an outcome that could hit firms practicing in the conveyancing sector particularly hard. “It will also be a much more vicious recession than was predicted last year. If you look at the housing market, for example, it’s already 70-80% down since before lockdown; and it won’t just bounce back after lockdown is lifted,” he says.

### TECH SOLUTIONS

So, given all this flux and uncertainty, what kinds of technology will be in demand with SME law firms going forward?

Obviously, in an economic downturn, efficiency and competitiveness are high on the agenda, but Bullion says that Covid-19 has raised additional challenges for SMEs. “While in lockdown, law firms can’t go out and about, or have clients come into their offices to sign contracts or other documentation. Also, most people don’t have printers at home,” he says – even posting a letter can be difficult.

At the time of writing, the UK lockdown was entering its fourth week – with everyone forced to work from home. Bullion noticed that law firms were already looking at improving operations – for example, orders for InfoTrack’s electronic signature software increased by 400% since January 2019.

This was in addition to a surge in use of its electronic client onboarding service. “A firm would usually post a pack of paper – including the care letter and the terms and conditions –



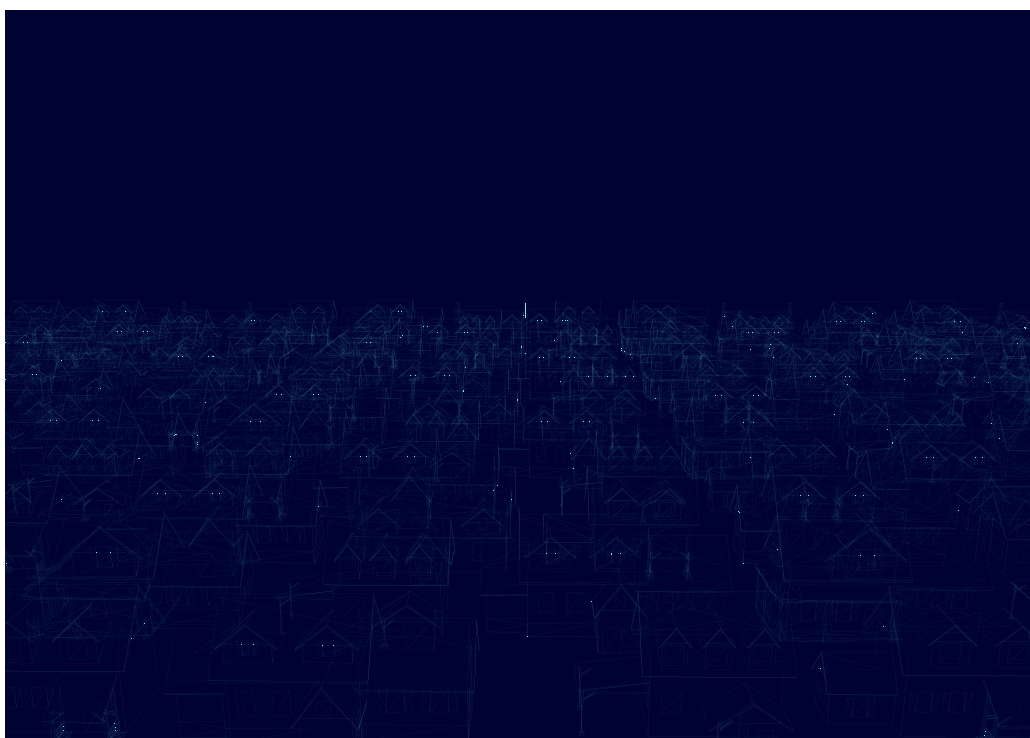
*We have to make sure that firms have access to support their processes, helping minimise the risk of fraudulent activity*

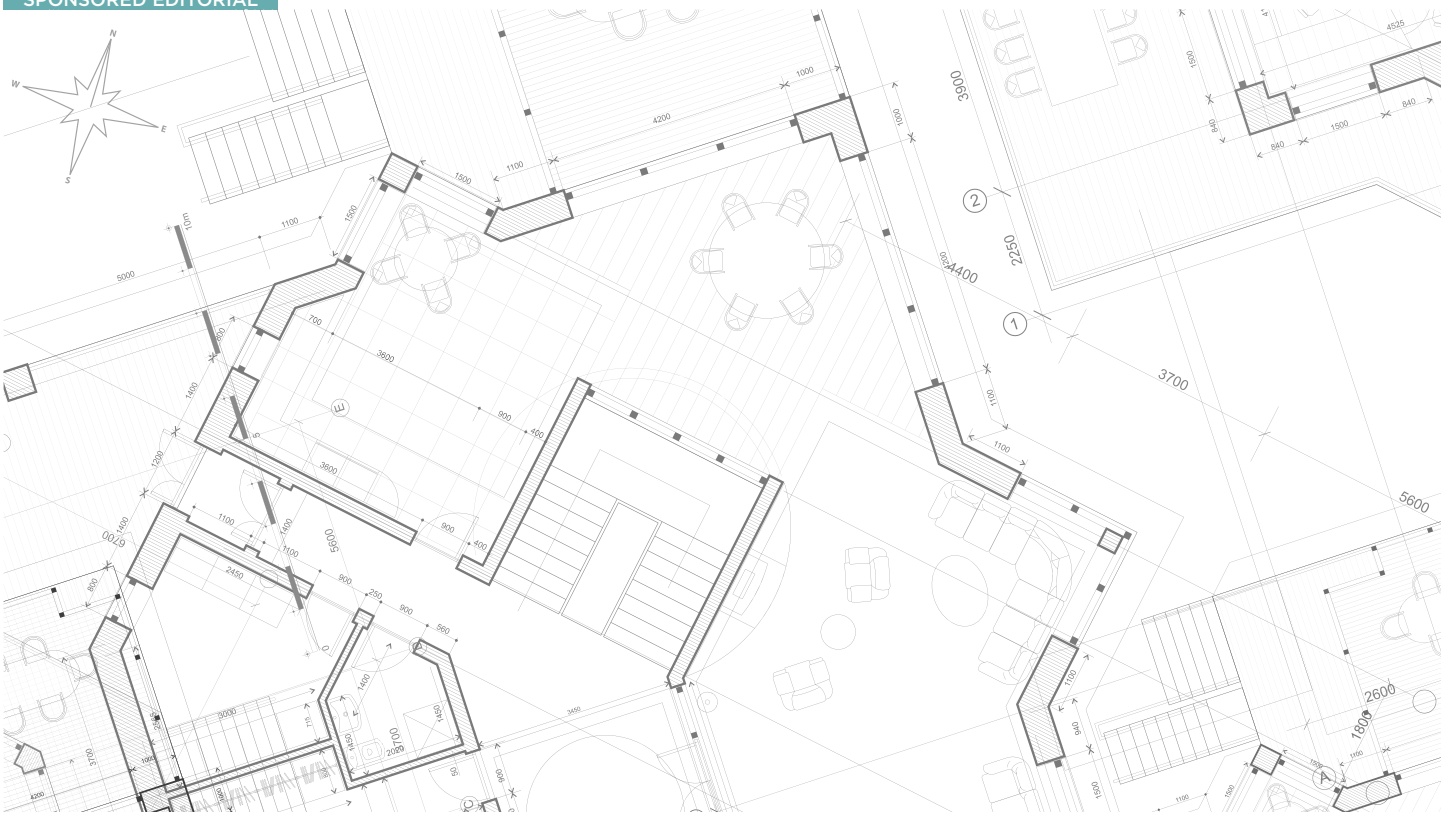
to clients and then wait for it to be signed and returned. This put pressure on clients who didn’t have printers or scanners at home. We take that all online – and clients are able to verify their identity using video.”

He says efficiency improved massively: “Property information forms usually take two weeks to come back and now clients return them to the firm within two days.”

He has also seen an accompanying demand for technology that will help guard against fraud. “Fraud is definitely on the rise – as it will almost always be during a downturn. We have to make sure that firms have access to support for their processes, helping minimise the risk of fraudulent activity – whether that’s verification of identity, AML or checking bank accounts of law firms and consumers,” he says.

And with fewer property transactions in the current climate, he sees challenges for law firms in terms of winning new conveyancing clients. “Some clients will go on value, others on price, and a fair few will look at a firm’s





*If a firm is forced to cut areas such as headcount, they need to look at what technology they have or are implementing that will make the process that those people did more automated*

technology. If law firms want to succeed, they'll have to demonstrate their value – which will increasingly be a blend of all three factors but certainly a focus on the tech. It's going to be a very changed market – and very changed clients.”

And the impact of Covid-19 on tech demands will be long-term. Bullion says that the big development is not just that certain kinds of technology will be in demand during the crisis, but that people will have the opportunity to become accustomed to using that tech.

“This isn't just about how we all survive this virus, a forthcoming recession, or the next year. Law firms have to get into the mindset of thinking about what they're going to do right now so that in six months to a year, they're growing rapidly out of a recession. A lot of that will be about the technologies that are adopted right now,” he says.

### A RISK TOO FAR?

Most law firms would agree that they need to constantly be evolving, but this necessarily entails investment – a risky prospect for firms facing unprecedented economic uncertainty.

“Law firms will be at different stages in

terms of what they want to do. But now is as good a time as any to review suppliers and ask whether they have the right products and services to actually benefit the firm for the long term. And leaders should also take a look at their own business and really work out whether investing in more marketing, or a particular technology, is an actual opportunity,” he says.

Bullion cites an example of such thinking from the Great Depression: at a time when virtually every business was in trouble and marketing investment low on the agenda, Procter & Gamble not only invested heavily in marketing but took the risk of being innovative with the available technology. “It invested heavily in marketing and was the first business to sponsor commercial radio shows using its soap powder – Oxydol. P&G ended up growing out of the depression very quickly and easily.”

There's a lesson there for law firms – and Bullion thinks it centres around finding technology to improve processes. “If a firm is forced to cut areas such as headcount, they need to look at what technology they have, or are implementing, that will make the process that those people did more automated. So, if you have a case management system, you need to ask whether it was staff who saved files, renamed them, updated them, and applied a cost to the ledger. That shouldn't happen anymore – those processes should just happen through brilliant integration.”

### MAKING IT SIMPLE

InfoTrack has put a lot of thought into meeting the challenges that SME firms will increasingly face when it comes to efficiency and competitiveness.

One outcome of this, Bullion says, is that its technology offerings improve efficiencies



across an entire firm – rather than in just one department. “If a client uses InfoTrack integrated with its case management system, because the software places costs of elements ordered back into the ledger, it makes it easier for the finance department as they don’t have to look for these costs and reconcile them. Everything is billed through one single bill, so they don’t have to deal with invoices from the Land Registry, the search provider, an indemnity provider, or from companies house and others,” he says.

And InfoTrack’s ability to simplify the notoriously unwieldy ‘enquiries on titles’ process helps firms meet the twin goals of efficiency and mitigating risk. “You’re firing emails to the other side, and there are multiple stakeholders; replies come back in dribs and drabs. We remove the number of emails that need to be sorted and filed by taking it all online to one place – including law firm to law firm and law firm to client communications. So there’s one single source of the truth rather than someone having to file these communications and risking missing something,” he says.

### BEYOND TECHNOLOGY

Bullion joined InfoTrack primarily because he felt that its technology made a real difference to the market. He could also make his own mark on the business: “In my role, I was able to cement InfoTrack’s position as a leading legal tech provider because there is a passion in everyone to support the legal market.”

He’s a believer in the idea that with every good technology platform, the tech provider still has to be able to provide a service – or software as a service (SaaS). “SME law firms sometimes need added



*SME law firms sometimes need added support with complex projects where there’s a lot of toing and froing between the local authorities and the end client*

support with complex projects where there’s a lot of toing and froing between the local authorities and the end client – and therefore lots of admin. We take on that work.

“Our commercial services team provides an in-depth quote to the client, the client agrees the quote, and then we order the elements that the law firm requires and handle the inquiries. Throughout the process, we provide the client with visibility and tracking on the progress,” he says.

And MI-InfoTrack – management information for law firms – also features a strong human element. “Our account managers have regular review meetings with clients and provide them with those summaries to ensure they’re abiding by compliance rules,” he says.

Bullion’s philosophy is forward-thinking and simple – aligned with InfoTrack’s goal of making lawyers’ daily tasks simpler, faster and more enjoyable. “Personally, I’m a bit of a gadgets man. I have Alexa controlling my lights, my blinds, my TV and more at home. It makes my personal life easier and more efficient. And I tend to think – why can’t technology be introduced the same way in our businesses too?” **LPM**





# TESTING TRENDS

Tom Quirke, managing director at SearchFlow, discusses the acceleration of three trends in legal as a result of the pandemic, and the impact of tech on conveyancing

There have been many declarations about how technology will transform conveyancing, says Tom Quirke, managing director at SearchFlow – but in reality, transaction times have increased in the last 10 years, the opposite of what we would expect.

We're seeing people become more comfortable with technology, consumer expectations shifting and law firm adoption across some, but not all, of the market, he adds.

"You tend to find that medium and large firms recognise the investment they need to make, and some are even doing it in-house. That shows a pent-up demand for efficient technology solutions, but it has an obvious upfront cost and so can be a challenge for the medium to smaller firms.

"Competition in the sector is driving the need to reduce cost while at the same time, firms are having to deliver great service, which translates into having an efficient and high-quality offering that can scale with business growth.

So, how are firms coping?

## PENDING ANALYSIS

According to Quirke, there are three main trends that have emerged in the legal market in recent years – and these are particularly true for conveyancers – which have been accelerated as a result of the Covid-19 pandemic.

One trend that is (obviously) seeing a lot of demand from law firms, and which SearchFlow has been enabling its clients to do for many years, is working from home.

Quirke says law firms typically have facilities in locations that are quite near to a town centre or major city, as it's important to have access to other companies in general but also be physically closer to a larger pool of potential clients.

"But a large amount of the work doesn't need to be done onsite; and rental overheads can be quite high. We're now living through a global 'proof of concept' when it comes to home working. Homeworking allows more staff flexibility to address customers' changing expectations.

"Those expectations are increasingly to have information when and where they can get it. So, for example, we're seeing many people are choosing a law firm between 7pm and 9pm, when they themselves have finished work and have time for other matters."

To insist that employees work those hours alongside the traditional commute and office environment could be too much to ask, he says. "Working from home provides employers the opportunity to flex hours around customer demand. And employers have fewer geographic constraints on hiring talent."

This goes hand in hand with the next trend, he says, which is of course cybersecurity. Working remotely can expose the firm to more cybersecurity threats if firms aren't careful about their processes and technology provisions, he adds. "We've designed a platform with cybersecurity in mind for that reason. It's our job to provide a secure and reliable technology – so, at a group level, we invest significantly in our

cybersecurity credentials and have a dedicated team.”

The upheavals we have seen in the global economy in just a few short months underline that resilience is a precious commodity, Quirke says. “Front of mind is now financial resilience, but reputational protection is important. Just as a company’s financials can be checked at HMRC Companies House, cybersecurity strength is equally straightforward to verify. The upshot is everyone can see how cybersecure your company’s website is.”

Data is the final trend Quirke sees. “Today, there is a requirement for more data, and we are increasing the number of datasets across our services. Being part of Landmark Information Group enables us to access a wealth of property data.

“The data-universe available to law firms is growing at such a pace that humans can’t efficiently review, absorb and interpret it. As such, insights need to be identified and derived on top of raw data, which in turn opens the door for artificial intelligence and machine learning applications. This means the old adage of ‘garbage in garbage out’ has never been truer; in other words, it’s not just the volume and sources of data that’s important, the ‘quality’ of that data is also fundamental.”

Put together you get a faster flow of property transactions to completions. Payments to law firms are expedited, lenders have shorter offer times, cancellations are reduced, and customers’ satisfaction is improved, he explains.

“This will be done with a secure flow of information with tight integration with law firms’ data repositories. Time to cash has never been more important to business and the cost to transact is under far more pressure. These forces drive change. To say the market is disrupting is an understatement.”

## RESILIENCE MEASURES

Quirke says when it comes to procuring technology, other sectors are more rigorous. He spent a good amount of time in telecommunications, before moving on to public safety, and then the banking sector.

“In my background, there were strict procurement procedures.” He says you had to prove that you could deliver, remain financially solvent in the tough times and have a tested business continuity plan (BCP) for unforeseen events.

“If integrating with customer IT systems, then clear evidence of strong cybersecurity is mandatory – a trust-but-verify culture. Only after these questions were satisfactorily answered in writing could you discuss your offering. This enhanced due diligence is coming to the legal sector.

“Given what’s going on in the marketplace right now, SearchFlow is being asked things we weren’t previously around our technology and business resilience. These questions are coming from IT directors, PSLs and managing partners.” This is a good thing, Quirke adds.

This will remove risk from the marketplace. He says firms have been forced to take a closer look and revise their BCP. “We’re all being tested, so it’s important to understand that resilience is a precious commodity at this time.”

SearchFlow, like many others, has always equipped its team with headsets, screens and work laptops, which are encrypted for GDPR and cybersecurity protection.

Another big area, Quirke recommends, is to do financial checks. “It’s something we do with our suppliers. You have to check their financial stability and resilience – it’s part of the fundamentals of procurement, just like cyber. It’s also surprisingly easy to obtain the information.

SearchFlow could see that there was going to be a lot of stress added to the market and that it would need to demonstrate its resilience. “We think there’s an important message to spread that firms can still thrive,” Quirke says.

It boils down to being able to help grow firms and reduce costs. “A few firms are now moving on from auditing their systems and revising BCPs and looking towards the future. We’re having a new phase of conversations about their three-to-five-year strategies.”

Technology continues to disrupt the legal market. Conveyancing itself has had huge evolution, which has meant more transactions can be done with fewer resource using automation. But, Quirke says, it’s about more than just increasing volume and cutting time: “Firms need to focus on their unique selling point, which is giving phenomenal legal insight and advice.

“With property professionals, it’s a huge step up to be able to pull information using a tablet or even smartphone directly in front of the client – when it’s appropriate to do so in person again. And this client interaction would be just as much about generating new business as it is about doing a proper search.”

He says building up layers of data and creating better user experiences for the conveyancer and client is where the attention needs to be. In the short term the market will be tough, but that challenge drives experimentation and change to find new ways.

“The law firm of the future will be very different. The next 10 years will see more change than the last 50. Those law firms that lean into that change will thrive in the 21st century. Who would have thought we would all be working from home and we would adapt in days and weeks? We can handle more change than we think.” **LPM**

## ABOUT US

SearchFlow is the leading property market service provider and one stop shop for all your conveyancing needs.

[www.searchflow.co.uk](http://www.searchflow.co.uk)





# BUILT TO LAST

Nurul Miah, principal at Kingly Solicitors, says SearchFlow supports his staff and his ambitious business plans

For Nurul Miah, principal at Kingly Solicitors, building a solid relationship is everything. "I'm very old school when I partner with companies. Loyalty means a lot to me and I'm loyal to the people I do business with."

"When I met SearchFlow, they made a great first impression – they were engaging and really accommodating – they truly understood my vision."

Miah says SearchFlow immediately gathered a team to support Kingly Solicitors. "I was blown away because here I am, a young entrepreneur trying to achieve big things, and here is a well established and highly reputable company rolling out their red carpet for me and asking me where they can help."

## THE VISION

Kingly Solicitors is part of NM Group, of which Miah is founder and managing director. NM Group started out as a wealth management company. "It's not the biggest arm anymore but it is the main foundation, which everything else is built around. Just a couple of years ago we had a large mortgage division of advisers who were

doing about £400m in mortgage lending."

Miah was working with a conveyancing portal and was looking to grow his business and take the relationship with the company to the next level. It was then he bought his first law firm and went through the processes of setting up an alternative business structure.

Unfortunately, the stars did not align to take the next step with the conveyancing company. "But it was a blessing in disguise because if I were to turn my business into a conveyancing factory then the level of risk would go through the roof, along with my professional indemnity insurance."

He decided to build up the legal arm – acquiring numerous law firms with departments he didn't have. Acquisitions were made throughout the country, whenever there was a strategic opportunity. He says the idea was to join up the legal practice areas and locations with the needs of clients, which would complement the wealth management side of the organisation.

"I'm really into cross-selling opportunities and implementing tech, both of which law firms are historically poor at doing. I'm very much of the

## LPM FIRM FACTS

**Kingly Solicitors**

**Revenue: £15m**

**Corporate status: Ltd (ABS)**

**62 fee earners, 175 total staff**

**Offices: 15**

mindset that practicing lawyers shouldn't also have to be businesspeople; you've got to let lawyers be lawyers."

## FOLLOW FLOW

So, where does this story lead today? Miah says SearchFlow became a part of NM Group in a big way. "When people say, 'people do business with people', I genuinely believe in that. I'm not a lawyer, nor an IT expert – it takes solid relationships to keep a business running. SearchFlow was really forward thinking in terms of what they want to do and how they can help."

He says the relationship and service he's received flows down to staff at Kingly Solicitors as well.

"There was some minor push back by a couple of the partners, as they were used to using other systems and didn't want to adapt, but overall the feedback from staff has been positive. SearchFlow is easy to use and provides lawyers everything they need to work through a conveyancing matter.

"We're using insights from the system to cross-sell to our wealth management side and other areas of the business. It's very helpful from a business development perspective."

And another big thing, Miah adds, is that SearchFlow is affordable. "It's great for cashflow;

and I don't feel like my business is forced to make a heavy investment, which is often the case for legal tech. Some of the contracts and behaviours I've seen in the legal tech space are shocking.

"But with SearchFlow, it's not like that. They're genuinely a company that's easy to work with, and they actually listen to me whenever I give feedback."

He says it's easy for a business to claim it listens to its clients but often the case is that it doesn't follow through. SearchFlow is interested in getting to know Kingly Solicitors on a strategic and personal level – things like money and logistics come later, he adds. "This really impressed me.

"And we're not just using SearchFlow, we also use the Intelliworks case management system, which is part of SearchFlow's wider business group. Plus they had the ability to cross-sell to me and I've taken that onboard and rolled it out across our network."

It provides everything staff need to deliver a secure, engaging and swift conveyancing service – including onboarding, search, post-completion and data insights, he says.

"From my perspective as a business owner, I'm extremely impressed and happy with the service SearchFlow provides," says Miah. **LPM**

## ABOUT US

SearchFlow is the leading property market service provider and one stop shop for all your conveyancing needs.

[www.searchflow.co.uk](http://www.searchflow.co.uk)



*SearchFlow was really forward thinking in terms of what they want to do and how they can help*

Nurul Miah, principal, Kingly Solicitors





# COMPLETE CONTROL

Stephen Luke, director and partner at Instalaw, says Insight Legal was crucial to the firm's growth and success

For a niche prison law firm with a strategy to expand its offering and deliver quality services to its clients, having the technological capability to do so unhindered by location or change is vital.

Stephen Luke, director and partner at Instalaw says: "I don't think we would have been able to expand as much as we have without the use of Insight Legal.

"And being a director in these times, when everyone is working from home, I need to make sure that everything is done properly and efficiently. Insight Legal has been second to none and has helped us to make that transition flawlessly."

## DOCUMENTS READY

Luke says right from the very beginning Instalaw knew it would need a one-stop shop system. "It was important for us that we could easily access client data remotely, no matter where we were in the country."

Instalaw currently has two offices – one in Nottingham and another in Staffordshire – and with a few consultants who work for the firm scattered nationwide, it needed a system with a high degree of flexibility.

"It's been a blessing during these unprecedented times because anyone can easily manage their caseload – take their laptop home, open it up and use Insight as if they were sat in the office. And, of course, it's crucial that we can store all of our clients' data securely."

Insight Legal offers an easy-to-use file management system that could be added to and adapted as the firm grew – this was a big thing for Instalaw.

And the system is backed up regularly, so the firm is never in a position where staff can't access client documents, no matter what else



*Being a director in these times, when everyone is working from home, I need to make sure that everything is done properly and efficiently. Insight Legal has been second to none and has helped us to make that transition flawlessly*

Stephen Luke, director and partner, Instalaw

happens. Luke says it's important to have plans in place should there be a flood or fire (or pandemic) – and with Insight Legal, Instalaw can still continue a client's case without any detriment to them at all.

The most important feature for the firm is document production. "We have very strict requirements for our clients," Luke points out.

He says the document production tab within each client's folder enables the firm to automatically fill in client details – name, address, date of birth, and matter information – at the click of a button.

"We have a large number of clients each year and some might have many different matters with us. Using Insight Legal means fee earners can concentrate more on the legal work side of things rather than admin. It also allows us to export key data from the system into the firm's Outlook folder."

Time recording also gets processed directly into the system. "A court application, for example, may take two hours to draft. Insight

## LPM FIRM FACTS

Instalaw

Revenue: £1.5m

Corporate status: Ltd

18 fee earners, 26 total staff

Offices: Newcastle-under-Lyme, Nottingham



*Having a mobile app saves time and it's convenient if we're out of the office on the move and need to quickly access client information*

Stephen Luke, director and partner, Instalaw

Legal will time that application and appropriately record that time into the sections we've set up in the system."

If someone needs a disbursement on a case, then there's an option in Insight Legal to record that as well. "A fee earner can fill out reasons for the disbursement, and then I get a notification, which I can then log into and either authorise or decline. This in turn goes directly onto the client's ledger."

And when the file comes to a conclusion, he says, we can see all the time that's been calculated, documentation and any disbursements that need to be billed, which is all saved in the client's folder.

Luke can also see all the financial information – profit-and-loss breakdown, outstanding bills, and so on. "From my management perspective, it's great. It also allows me to easily add and remove users of the system, increase or restrict permissions, create fee earner reports and so on. It's a great company tool as well as being a great help to our client database."

## ON A PERSONAL LEVEL

Luke says working with Insight Legal feels more like a personal relationship than a business one. "Insight Legal will work with us to make sure the system suits our needs as the firm develops and grows."

Instalaw has seen some recognition for its strategy and people in recent years – and during an awards ceremony, Luke says Insight was there and celebrated with the firm, as part of the firm.

"I can call them up if there's an issue or query and they will deal with it straight away, which I really like as I don't have to wait for a call back," he adds.

A piece of functionality the firm added later was the ability to automatically put key dates into an Outlook folder. Luke says: "It just made sense to be able to link that to our Insight system. After speaking with Insight Legal, they did that within a matter of hours."

"Another great thing around communication is the newsletters that Insight send us, which will include any updates that may be coming or anything that we could benefit from."

One such update the firm has taken advantage of is Insight Legal's new integrated mobile app. Luke says the firm continually reviews its use of the system to see how it can get the most out of the software. "Having a mobile app saves time and it's convenient if we're out of the office on the move and need to quickly access client information."

Cost is obviously very important. He says when Instalaw first started out, it needed a system that was affordable. Insight Legal is billed on a monthly basis, based on how many users you have.

And, he points out, it's not a difficult system where you need a dedicated IT person to run it all the time.

Luke says: "I must say, in the five years that we've used the system, we've never had a significant problem at all. It all just works flawlessly." **LPM**

## ABOUT US

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

[www.insightlegal.co.uk](http://www.insightlegal.co.uk)

**INSIGHT LEGAL**  
SOFTWARE

# POINTS FOR PROFIT

Neil Lloyd, managing director at FBC Manby Bowdler, says Accesspoint understands the firm's needs and supports its efforts, seamlessly and reliably

FBC Manby Bowdler (FBCMB) has been in a hosted environment since 2008. About two years ago the firm undertook a review of its IT systems. Neil Lloyd, managing director at the firm, says that after doing a full market review, FBCMB decided it would move to a combination of Accesspoint and Tikit.

"Accesspoint is reliable – working smoothly day in and day out, without the need for someone to maintain IT in-house. We wanted a hosted environment that was consistently available for our teams, ensuring they could be the most productive possible.

"This has been achieved by Accesspoint. They provided a seamless solution and the team are very responsive when we need their help."

## BUILDING REPORTS

Accesspoint has been very active and supportive of the firm and its needs, says Lloyd. But the true testament of Accesspoint Legal Services' expertise and ability came when FBCMB wanted to improve the KPI and reporting functionality to staff – something the firm had been struggling with previously, he adds.

"We have 24 team leaders each with their own teams across the firm, and they were asking for more in-house support around data and analytics.

"We had various options – one was to purchase a third-party reporting package, another to

develop the reports in-house, or outsource the report writing – and that's when we turned to Accesspoint.

"They were brilliant. They came in, listened to what we wanted to achieve and showed us what was possible. We then gave them a detailed brief and they were able to deliver that within a month."

With Accesspoint's help, Lloyd says the firm now has far greater clarity over time recording, which it didn't have before.

"We have better visibility of the performance against our targets, and lockup as well. It has made it a lot easier for the team leaders to see everything because it's in one place, rather than having to scroll through screens like they were doing before.



*We have better visibility of the performance against our targets, and lockup as well. It has made it a lot easier for the team leaders to see everything because it's in one place*

Neil Lloyd, managing director, FBC Manby Bowdler

## LPM FIRM FACTS

FBC Manby Bowdler

Revenue: £13.2m

Corporate status: LLP

217 total staff

Offices: Wolverhampton,  
Willenhall, Telford, Shrewsbury,  
Redditch, Church Stretton,  
Bridgnorth, Birmingham

## ABOUT US

Accesspoint Legal Services offers consultation on a variety of IT and other business-related issues. We provide the best in legal IT solutions to help firms work more effectively and efficiently.

[www.theaccesspoint.co.uk](http://www.theaccesspoint.co.uk)


"And it's great for cashflow. Since our cash collection process begins at 14 days, we wanted reporting that reflected that and now we're able to really track our performance against that goal, which has led to a great improvement in our credit control procedure overall."

He says not only does the firm get better insights at an individual or team level, Accesspoint Legal Services' highly skilled development team built trend analysis reports as well, which have helped the firm develop our forecasting models.

## SUPPORTED CHANGE

Lloyd says moving to Accesspoint was a no-brainer. "The reason we decided to move our hosted provider at the same time as our practice management system was because of the expertise that Accesspoint provided in terms of supporting Tikit."

He says the transition was fairly seamless. FBCMB moved to Accesspoint's hosted solution on a Monday and was able to go live with Tikit on the Friday of the same week. "We had a proper joined-up approach between our project team and the Accesspoint team, but the reason it was as seamless as it was is because of the amount of planning we did together. They showed us true support."

The Accesspoint team don't just work well with law firms, Lloyd adds, they also work really well with other system providers. The team was able to provide support recently during the launch of FBCMB's new intranet.

"And we've adopted their helpdesk system. Queries are now logged directly with

Accesspoint and it doesn't take long for them to come back to us. We've also got improved traceability on the tickets processed and reason they were posted."

All of these have been steps to building a stronger and more stable firm. When lockdown happened in March, it was apparent just how important it was being able to enable all 200-plus people to work from home. Lloyd says: "With Accesspoint's help we were able to do that without a hitch."

"I know some law firms weren't able to make the transition as smoothly as we have but we were fortunate enough not to have any real issue with the change."

Accesspoint also set up Microsoft Teams to enable the firm to communicate internally with staff as it adapted to remote working, and crucially it allowed fee earners to do court hearings virtually.

As businesses open up again and a new normal is created, FBCMB will be taking steps to roll out desk-booking software, which will also ensure the appropriate social distancing guidelines are being followed, Lloyd says.

Unfortunate as the situation is globally, FBCMB has been able to create a positive: "Some of these things we've been wanting to do for years now. I come from a background where you didn't have your own desk, you could book in advance and turn up and work for the day."

"Going forward, with Accesspoint's support, we'll move towards a more hybrid model of people working from home and at the office."

All of this wouldn't have been so seamless without the help and expertise of the Accesspoint team, he says. **LPM**

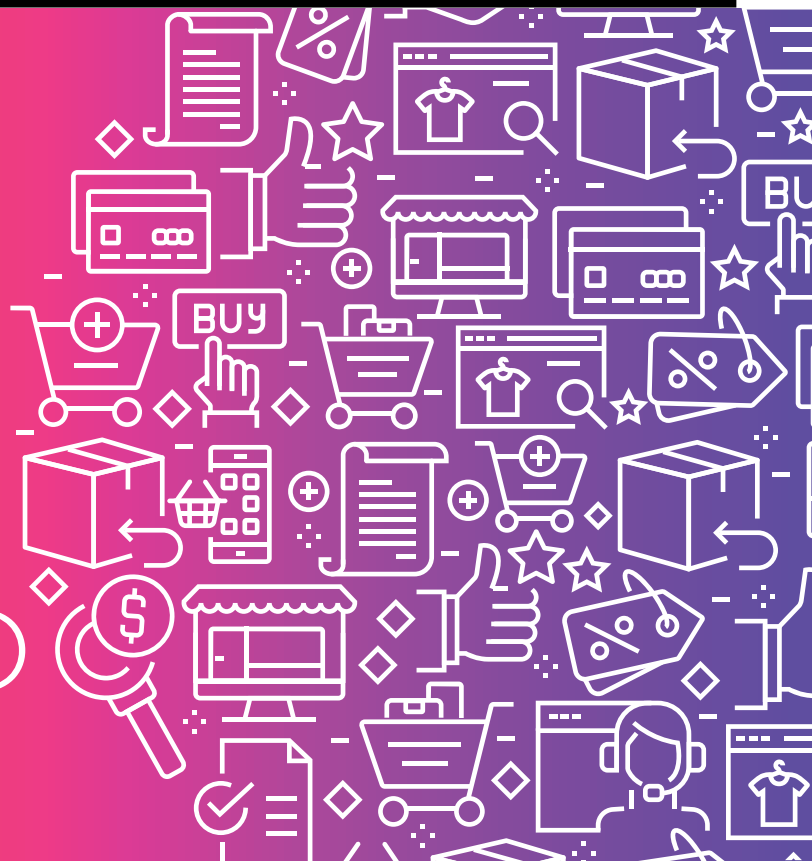


*We had a proper joined-up approach between our project team and the Accesspoint team, but the reason why it was as seamless as it was is because of the amount of planning we did together*

Neil Lloyd, managing director, FBC Manby Bowdler



# HOMEWARD BOUND



Perfect Portal's founder and CEO Yvonne Hiron, and marketing manager Sattu Dhaliwal discuss changes in law firm client demand and how to streamline the client journey

Understanding the importance of being digital is the first step to ensuring law firms' long-term business success – but this doesn't come from thin air, says Sattu Dhaliwal, marketing manager at Perfect Portal. She says the demand from consumers for companies to provide more information in a digital format, on-demand, has been the norm for a few years now.

"For the legal sector, recent changes in regulations, notably the pricing transparency rules, have forced law firms to be more upfront and public about their fees and services."

Of course, at the moment, only certain practice areas are required to post their information in a clear manner on their website – for the benefit of prospective clients. But, given the push in the legal sector for firms to become more client-centric, all practice areas should be put to the test, and will be by their clients.



*Barriers around communication provide the biggest frustration for consumers. They love the end result but don't like how poor the communication was*

Sattu Dhaliwal, marketing manager, Perfect Portal

"People are a lot more aware – they can search more easily on the internet and shop around a little bit more. Not only are they asking for firms to be more straightforward with them, they also want the service to be hassle-free.

"Barriers around communication provide the biggest frustration for consumers. They love the end result but don't like the poor quality of the communication. This is why more client portals and apps have been coming into the market."

She says clients are in the driving seat and that though legal has historically been behind the curve in terms of transforming the client journey and using technology to achieve that, there is innovation in the market.

## FIRM CHANGE

Yvonne Hiron, founder and CEO at Perfect Portal, says law firms are begging for technology to remove the cost and time spent on manual tasks, largely admin-related but also process and workflow-based.

"The pandemic has highlighted just how impractical and archaic it is that some of these processes are still being done manually or rekeyed across different systems. Some firms probably thought they were quite digital having a case management system, but I think they've realised that it's not enough."

She says it's crucial that law firms and legal tech vendors talk about integration, which is why Perfect Portal actively encourages integration with other suppliers.

Dhaliwal adds: "Luckily, the industry has evolved, and with that so too do the conversations and innovations with law firms. We

## SPONSORED EDITORIAL



*Anyone can send a quote to a prospect but it's how you get that converted and what you do with it afterwards that matters*

Yvonne Hirons, founder and CEO, Perfect Portal

started out as a simple conveyancing quoting tool. But what we found was that there was so much more that technology could do for the conveyancing process such as lead conversion, file sharing, client comms and portals and wider law firm marketing.

"Law firms have been looking at their branding and realising that there's a lot more that can be done. We've become an extension of their marketing department."

Having a mobile app branded to your firm is a surefire way of retaining a client, increasing referral rates and improving client satisfaction, she adds.

Hirons agrees: "From the end-client's point of view, everything is in one place. If they need to find a document they don't have to think about where it is, all they have to do is open the app. From a law firm's point of view, they could potentially have a client for life, because the service has been pain-free and seamless, and the client already has an app on their phone with their brand on it."

She adds that as law firms focus more on becoming client-centric and bringing tech together to cut out mundane work so that fee earners can do what they do best, Perfect Portal wants to ensure that the client journey is "beautiful end to end."

#### ABOUT US

Perfect Portal helps law firms win more business with a range of customisable lead capture tools, including dynamic conveyancing quote calculators and automatic follow-up features. Plus a firm branded mobile app to enhance customer experience.

[www.perfectportal.co.uk](http://www.perfectportal.co.uk)



#### THE CLIENT'S FOOTSTEPS

What does an ideal client journey look like?

Hirons says it starts before the client becomes a client.

"Law firms are not always as good at converting leads as they are at delivering the work. It doesn't matter how good the lawyer is if you don't have clients to work for." It's not rocket science, she says, but in order to be successful, firms need to fully integrate the lead generation and conversion within their processes – which will provide clear visibility of their pipeline and

status, whether the work comes via their website, referral network or direct consumer contact.

She says the whole conversion process can be automated. "We need to ensure that our software can help law firms in the processes they already have. Some SME law firms will have a new business team or someone in business development, but others won't. Our system isn't a one-size-fits-all, it's adaptive to the needs of the law firm."

Hirons says the automation of follow-up can be a game changer. "Whether it be an SMS or push notification at the end of the day a quote is a quote. Anyone can send a quote to a prospect but it's how you get that converted and what you do with it afterwards that matters."

Lawyers are busy, it's pointless having them or admin staff double-keying information, she adds – it's about having a nice, simple intake form so that a lead can smoothly transition into a client within the case management system.

"The client goes through the workflow and all of the magic is happening behind the scenes with information sent via the app: push notifications, document sharing, AML checks and ID scans, e-signature, constant transparency and communication, and so on."

This goes back to the point about the importance of marketing. Technology and branding are working together seamlessly to create a smooth client experience, she says. "Every single touchpoint with the client – whether on the firm's website, through the estate agent or by app – is branded."

Hirons and Dhaliwal agree that law firms have come a long way. Hirons adds that the things conveyancing firms are learning during the pandemic will move the industry more in line with the times.

"It's a good eye-opener for them that change needs to happen to improve the client journey and meet client demand." **LPM**



# TOUGH ANALYSIS

Simon Farthing, commercial and marketing director, LexisNexis Enterprise Solutions, says accurate problem analysis ensures technology adoption down the line

Several years ago, after moving from practicing law to trying to innovate it, I was sat in a requirement gathering session with end users in my firm. We were to define a departmental solution, to hear their challenges and opportunities. I was excited, I knew we could help, we just needed to know where we could have most impact. The problem was that the person I really needed to get on board was glued to his Blackberry. It wasn't his fault, he, like most busy lawyers had a day job that needed doing. Due to his lack of engagement he actually found change happening to him rather than being an agent of that change.

For technology adoption to succeed, experience shows key stakeholders cannot abdicate decision making at any level, deliberately or inadvertently. No one can know their business as well as they do, not even the consultants they employ to help them with technology selection.

## A BUNKER MENTALITY

Today we're increasingly seeing more practice representation in IT projects, but often the approach is to design a 'perfect' solution and lock its development until the 'big reveal' to the firm. In the interim, business and user requirements will either have changed or they weren't accurately defined, so the resulting

solution doesn't hit the mark. It's akin to a bunker mentality – even with the best designed systems in the bunker, the longer you are shut in there the further the solution moves away from the problem, particularly when the world is changing as fast as it is today.

Adopting a continuous development approach to application creation is more productive. Having 'eyesight' over a project to ensure that the application is indeed progressing towards a solution to the business problem is key. It helps stakeholders to course-correct, following visibility of a previously unrecognised problem, inaccurate problem description, misinterpretation or even a fresh market opportunity.

## 'SOLUTIONISING' THE PROBLEM

The tendency is to 'solutionise' the problem. As Henry Ford once allegedly said: "If I had asked people what they wanted, they would have said faster horses."

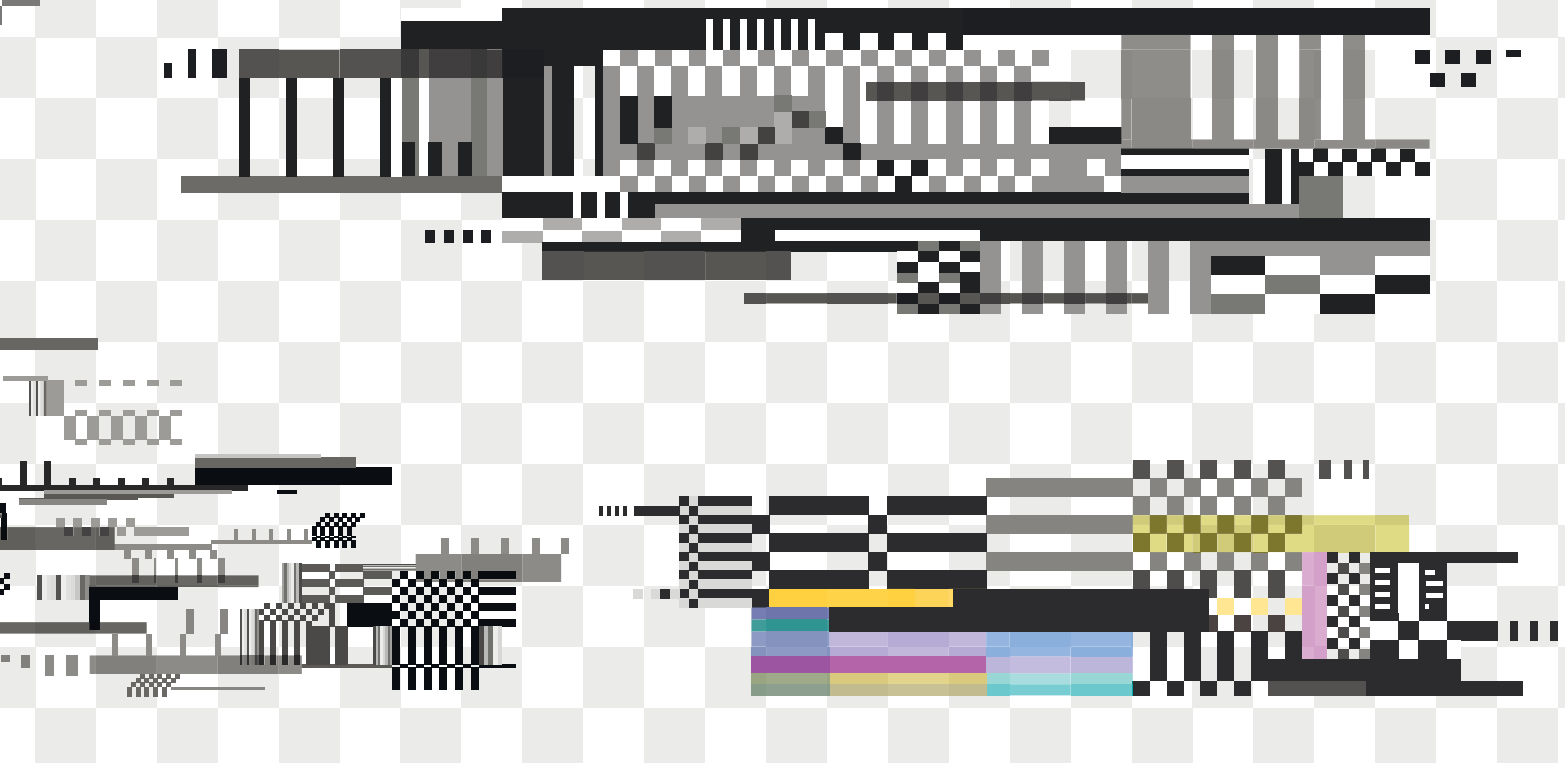
For example, case management system users in a conveyancing firm may describe their problem as 'we find it hard to onboard new clients'. The firm's typical solution to the problem? 'We need a new onboarding tool'. In effect, the firm is defining the solution without analysing the issue. So, they buy a new system that they didn't need, which then ends up as another 'failed' project due to a lack of adoption because it didn't address the problem.

## ABOUT US

LexisNexis Enterprise Solutions provides Lexis Visualfiles, a legal workflow and case management system, to help businesses deliver client service excellence

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*Firms will frequently find that the solution already exists, it's a matter of applying the toolset to the problem. If it doesn't, you know that technology spend is justified*

Problem analysis helps to understand the issues, identify the gaps in processes and knowledge, and evaluate existing technology for quick, cost-efficient solutions.

Say, the same conveyancing firm finds that getting clients to sign up is difficult because there's a time-consuming regulatory process that needs to be followed. Clients find it frustrating – it requires numerous forms to be filled and occasionally demands that they come into the office. This causes delays. So, the requirement isn't for a new onboarding solution, but making changes to the current processes in the case management system to remove the regulatory hindrances while making signing up easier for clients and risk-free for lawyers.

#### OVERLOOKING CHANGE

There's a level of operation that a firm becomes content with, alongside an aspiration to do better – hence the motivation to invest in technology. But, firms rarely pay attention to change management to close the gap between expectation and reality.

For a new solution, firms often ascertain the time it'll take to develop and implement the application but fail to consider the impact on the business in terms of effectiveness, efficiency, and profitability during the transition period, until the solution is well adopted.

This is a major cause of an expectation gap and disappointment, which in turn gets attributed as a 'failed' technology. Because users aren't invested in the new solution, despite it being better suited to their current needs, they automatically resort to the old processes and technology – even if substandard – because it's familiar.

Change has a price and consequence – it must be budgeted for in the form of user involvement from the start, regular communication, and well thought through, continuous training.

#### ACQUISITION INTROSPECTION

Firms oscillate between investing in shiny new systems that 'solve' a business issue and spending no pennies at all on technology. Both approaches can result in failed technology projects. A more astute approach is to see if you can leverage and optimise the existing toolset first. Firms will frequently find that the solution already exists, it's a matter of applying the toolset to the problem. If it doesn't, you know that technology spend is justified.

To this end, the role of technology providers – for example, that of a supplier or a tech partner – has a huge bearing. By investing in technology through a partnership approach, they'll take a long-term view of your implementation, enabling you to implement a solution that is suitable for the business immediately, and for the foreseeable future. Client advice and consultation are core elements of their offering. These services can be the difference between technology success and failure. **LPM**





# YOU'LL GET BY

With a little help from your friends, Tom Bailey, managing director at Post Partner, says SME law firms are adapting to more digital ways of managing and posting documents

**C**ontrary to the common criticism that 'lawyers are too slow to adapt', the legal sector can be proud of its admirable reaction to the unprecedented challenges presented by the Covid-19 pandemic.

Across the various forums we engage with, there are common and positive messages from practitioners: 'when we need to, we can adapt quickly'; 'we can work effectively remotely'; 'videoconferencing is a good meeting tool'; 'my team works well without the supervisory trappings of the office environment' and so on.

The overwhelming sentiment is that people don't want things to go completely back to normal. People are not missing the 6am train to London for a one-hour meeting, nor the requirement to be in the office five days a week 'because that's what we do here'.

The pandemic achieved, in a couple of

weeks, what countless hours of expensive change management consultancy could not! Never truer is the old adage, 'necessity is the mother of invention'.

Some challenges, however, remain. And if we are to carry forward the best elements of what necessity has forced us to invent, namely more flexible working arrangements, we will need technologies to support the improved new normal.

## POST PANDEMIC

Distribution of the daily post has been a major stumbling block for many firms.

Fortunately, in today's marketplace, a high percentage of correspondence is electronic and easily distributed to workers, wherever they happen to be. There are certainly some security issues to consider with email and other e-transfer mechanisms, but in most cases, the rapid shift to homeworking hasn't had a major impact in terms of access to

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*Does the post room team have the facilities to add documents directly to the case management system? Is the post activity easily reportable? 'No' is often the answer, meaning that fee earners don't have timely access to critical documents*

electronic documents.

The hard copy daily post on the other hand, has presented real difficulties for businesses that are not geared up for volume scanning and onward distribution. In extreme cases, firms haven't been able to get to their post at all for weeks on end – where, for example, they lease space in a managed building that the landlord has been forced to lock.

Even for businesses that do have scanning facilities, a light has been shone on their effectiveness. Does the post room team have the facilities to add documents directly to the case management system? Is it a quick process? Are documents indexed correctly? Is the post activity easily reportable? 'No' is often the answer, meaning that fee earners don't have timely access to critical documents.

Some winners in this respect, we're delighted to say, are our current clients. Post Partner helps clients to simplify the task of getting each item of post correctly indexed and all the way from the envelope into the correct matter in the firm's case management system. As such, as long as practitioners can access their normal systems, they have been OK.

## COMMUNITY COUNTS

"Post Partner has been a crucial supplier to us during the Covid-19 pandemic. A member of our team has been able to

attend the office each morning and within a couple of hours has scanned and distributed all the daily post via our CMS. This has allowed these very abnormal times to remain as normal as possible for our fee earners," says Matt Ratliff at Sort Legal.

Here at Post Partner, as our name might suggest, where there's an opportunity to collaborate, we jump at it! We know that fighting tooth and nail to attract the best talent and clients is just the brutal reality of business. However, we feel that access to the best tips and tricks when it comes to business administration should be freely available across our profession, and shouldn't be an area of competition. Life is hard enough, right?

We want to become a useful resource for the entire conveyancing community. That's why, in the coming months, we're launching the Post Partner Community – a forum where likeminded professionals can share best practice and hard-earned industry knowledge in the very many areas where we simply don't benefit by competing with one another. We all went into this profession to help and advise others. Let's do what we can to help and advise each other!

Our priority at Post Partner is, of course, to support our valued clients in any way we can, but in addition we want to become a useful resource for the entire conveyancing community. Please watch this space if you feel you would like to get involved. **LPM**

## ABOUT US

Post Partner, powered by Brother, is an innovative scanning solution that removes the hassle, time and potential for error, when digitising the daily post.

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