SYSTEMS IN PRACTICE

What is the role of a practice management system in today's legal business?

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Sustained and unpredictable change this year has given legal businesses a clear idea of what technology has to offer – be it efficiency, savings, agility or resilience, among other benefits. On the flipside, operating in crisis mode has exposed critical gaps where digital tools fail to meet business needs – which, in turn, can change from one day to the next as things stand. It's up to technology to keep up.

This LPM supplement takes a deep dive into practice management systems (PMS) – among the earliest digital tools adopted by the legal sector, and now a fundamental part of any practice. With all that has transformed, what role does a PMS play in law firms today? What part could it be playing under the circumstances? And, given the higher standard being set in the new normal, what do law firms expect from their PMS going forward?

Read on for a discussion of all these defining questions. Bishu Solomon Girma of Access Legal explains the company's consultative approach to PMS implementation, while other experts address consolidation in the legal technology market, strategies to mix and match a range of solutions to your advantage, and choosing a provider that can support you on this journey.

Also in the mix is a guide to a people-driven PMS implementation, a pros and cons list for choosing the right software and five reasons why integrating a PMS with a document management system is the best way forward.

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WHAT'S INSIDE?

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Quest for bespoke

Nearly everyone in the legal industry concurs that technology is a great enabler – although when it comes to the specific case of a practice management system and its use in SME law firms, Aftab Bose finds ambiguity as to its exact remit

s a practice management system (PMS) by its very nature designed to work in the background? Or is it – much like advanced technology in other industries – due to come out of the shadows as a driver of innovation, growth and resilience? Conversations with those in SME legal reveal a wide range of expectations, with the more demanding side of that spectrum signalling that PMS technology has a long way to go to fulfil its potential.

OILING THE WHEELS

Peter Carr has been a member of the IT team at Fisher Jones Greenwood (FJG) for 20 years, and a non-legal partner for the last decade. "I've seen the PMS here evolve from a document management, production and accounting system, into a system that we heavily rely on to run the entire practice," he says.

For him, the system's greatest value lies in its efficiency – where all documents, records and letters are standardised and easily accessible, while in-built automation throws up suggested files, putting relevant information right at employees' fingertips. Automation also allows for

real-time risk calculation, all while standardised and automatically customised digital templates have allowed the firm to stop printing letterheads – facilitating roughly £250,000 in annual savings.

FJG has been with the same PMS provider since 2007, and Carr is satisfied with the way its functionality has evolved with disruptive trends – not least the pandemic and the hybrid-working paradigm. By having a remote login for the PMS, Colchester-based FJG's complaints officer can operate from Wiltshire, while the same capabilities allow external case-by-case consultants to access the PMS as and when required, from wherever they are.

The very same PMS has achieved longevity elsewhere too. Gardner Leader's managing partner Derek Rodgers reveals that his firm has been using it for nine years now, and it was decisive in helping the firm to move from having the capacity for 30 people to work remotely to supporting 140 people within a week of the first lockdown hitting.

"From a leadership standpoint, the PMS gives me a good overview of financial data and management information that is crucial to the

firm's running. And from a general practice viewpoint, we certainly get the impression from people who either join us or leave us and move on to join other, much bigger firms, that the system we have here is good and competitive," says Rodgers.

MAGNETIC FORCE

The war for talent in legal being what it is, the value of an efficient system cannot be underestimated. According to Carr, it has been a decisive factor in attracting the right people – and retaining them. "We have people come to us because we are tech-centric," he explains.

"They have joined firms that pay better and been there two weeks, and they just can't cope with the manual processes in place. They come to us because they are more productive, happier, and have a good framework and all the tech they need wrapped around them."

But It's not just talent that needs to be brought on and retained. Competition is also intense for clients – who, faced with their own management pressures, are growing more demanding by the day. According to Carr, his PMS has a role to play here too, although this is where the market, as it stands, is found wanting.

"Everyone has good lawyers," says Carr, "but consumers now want to use legal services as they use other services such as banking or insurance, and both PMS providers and law firms need to step up.

"A high-quality PMS will keep the client in

contact with their case through well-structured, meaningful documentation, delivered through an electronic portal such as an app. It'll also have a seamless onboarding process where communications are handled through the app rather than via email – where your message to your lawyer can get lost in backscatter. Questions being logged in the portal can be addressed quickly by anyone reviewing the file."

Portals have a place in the PMS future at Gardner Leader too, although one experiment in this direction didn't quite yield the expected results. "We found it very difficult just to stop the clients reverting straight back to email and, once they did, it was then very difficult to get them back onto the app," says Rodgers.

While his firm has aborted that mission for now, Rodgers acknowledges – as does Carr – that portals offer a lot of value for the future of the client experience, highlighting the need for better user experience and other strategies that can drive greater adoption of portals, among law firms and clients alike.

MATCHMAKING

As things stand, the SME PMS represents a confluence of back-end efficiency and flexibility, which is not only valuable for talent attraction and (indirectly) better client service – it has also formed part of the premise for entire firms being merged this year.

In September 2021, West End London law firm RIAA Barker Gillette (RBG) announced that it had incorporated Tibber Marks Solicitors – a

boutique property law firm based in North London – to form an 80-strong, full-service legal business. According to Alex Deal, managing partner at RBG, the firm's newly upgraded PMS as of September 2020 played a defining role in securing the merger.

"While there were a number of strategic reasons why a merger worked, one of the first things that director Ben Marks and I had a conversation about was the PMS we use," says Deal.

As it happened, the PMS that RBG had just adopted was the one Tibber Marks had been eyeing for some time but had found just out of reach from a cost perspective. "It was the most expensive of the ones we were looking at, and it was going to require an awful lot of specific admin input. We would have needed to recruit staff to make it work the way we wanted it to," explains Marks, who is now a residential property partner at RBG.

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"Consolidation and commoditisation have meant two umbrella families of solutions now control available systems. Both have differing strengths and weaknesses, but neither appears more innovative than the other."

Sean Stuttaford, chief operating officer, Thompson Smith and Puxon Solicitors

"Hearing that RBG had this system, and was investing in growing and optimising its use for each individual department, was a massive part of our thinking behind why the merger was a good idea," he adds.

BESPOKE, IF YOU CAN

What Marks says about having the resources to optimise a PMS neatly sums up the state of the technology today. We have a robust and efficient infrastructure that can accommodate a plethora of integrations and advanced functionalities – provided you have the expertise to understand and implement them.

RBG has such capacity at hand, and both Carr and Rodgers acknowledge that the currently versatile system they have in place in their own firms is the result of integrations with myriad other products – managed by their in-house IT teams, and giving rise to a bespoke system that meets their firms' specific needs.

All three firms are now similarly eyeing business intelligence, and possibly artificial intelligence tools, which would analyse repositories of data flowing through the PMS to deliver granular insights about their business performance – feeding innovation, cost-saving, growth and optimisation. Doing so will require finding another tool out in the market and integrating it with their existing PMS – another journey for their well-equipped IT teams.

And while there is always room for improvement, these businesses are satisfied with the PMS being a framework that they can craft as they please – though others view such a wireframe role as inefficient, costly, and even restrictive at times. One with a more critical viewpoint is Sean Stuttaford, chief operating officer at Colchester-based Thompson Smith and Puxon (TSP) Solicitors.

SHACKLED INNOVATION

Stuttaford has recently been developing his firm's new PMS – incidentally the same as in place at FJG and Gardner Leader – to build a bespoke system by pulling in capabilities from a range of solutions. Much like his peers, he is also now embarking on a business intelligence journey. That said, this process of innovation and integration has been peppered with obstacles – ranging from product flexibility to the structure of the PMS market as a whole, he says.

"At its core, our new PMS is a good, solid product, and we're confident it'll do well. But is it really innovative? I don't think so," says Stuttaford. "For those of us who have spent the last 20 years developing such tools, a long standing problem in the marketplace is a lack of open-source integration, which restricts the products that a given PMS can work with."

So, for instance, TSP currently uses select e-signing software and specific digital dictation tools – neither of which would necessarily be the firm's first choice, Stuttaford explains – because the PMS won't integrate with other tools, some of which are market leaders in those areas.

Then there are restrictions on automation. "A big area of innovation for law firms is automating processes, such as reminders, checks and balances for risk, compliance and other critical functions. But, the PMS only has a set number of automated processes to start off with. Adding more would rely on the purchase of third-party products," says Stuttaford, adding that this was not highlighted at the point of purchase, despite the vendor being briefed on TSP's specific needs beforehand.

And this is not just the case with TSP's provider. According to Stuttaford, in his experience, the rigidity in PMS technology can be pegged to structural changes in the market in recent years. "Consolidation and commoditisation have meant two umbrella families of solutions now control available systems. Both have differing strengths and weaknesses, but neither appears more innovative than the other. They offer similar things, to different degrees of flexibility."

As it happens, Stuttaford and his firm are now in a long-term relationship with a provider that was on their shortlist – but not their final selection – owing to the newly purchased product being acquired shortly after the deal was concluded.

Frustrating developments aside, he feels this commoditisation runs at odds with innovation in his firm's segment of the SME market. "A firm of our size has limited choice of products, and even fewer providers. So, no matter which product we choose, we stumble into limitations with time – pushing us to undertake the cost and time intensive task of bypassing some inbuilt functionality and creating significant layers of proprietary systems to fill the gaps.

"The PMS we have developed has some areas so far removed from the original product that we've had to double down on traiing to roll it out among our staff," says Stuttaford. Now on the other side of this hill, however, Stuttaford adds that TSP is pleased with the introduction of the new system, and is sure of ensuing benefits to staff and clients.

No doubt, similar structural obstacles might affect innovation journeys across the SME legal industry. That said, most leaders in the space – including Carr, Rodgers, Deal, Marks and Stuttaford – are working with a wide range of solutions and providers to keep their PMS fit for purpose. Against that backdrop, Stuttaford's words of advice for law firms – of note for peers and PMS providers alike – is to "choose the provider you think you'll get the most support from." **LPM**

LPM FIRM FACTS

RIAA Barker Gillette

Revenue: £6m

Corporate status: LLP

53 fee earners, 25 support staff

Offices: Central and North London

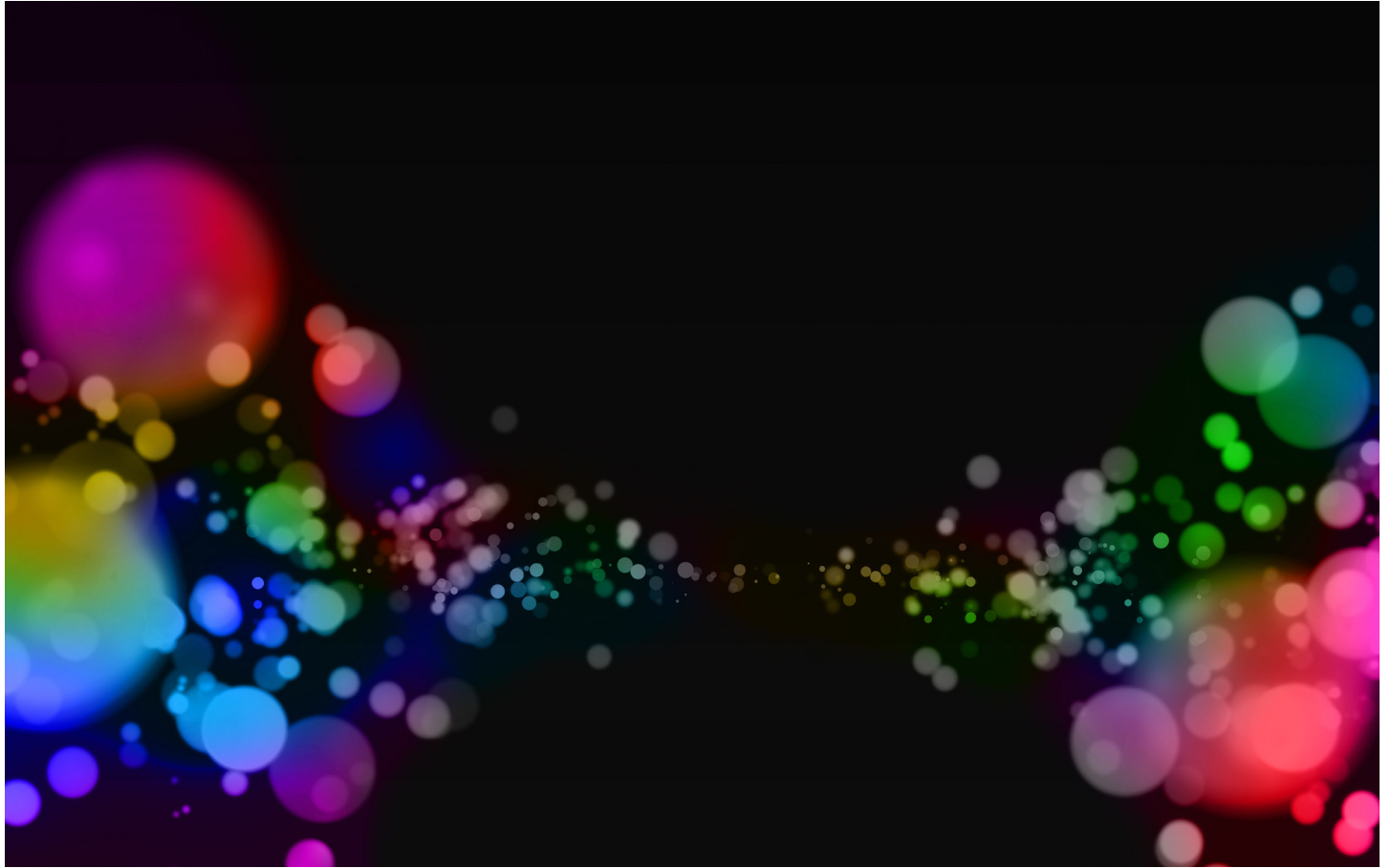### LPM FIRM FACTS

Thompson Smith and Puxon

Revenue: £5-6m

Corporate status: Partnership

39 fee earners, 34 support staff

Offices: Suffolk and North Essex

THE BIG SHIFT

The pandemic drove a 'big bang' of change in law firm innovation – what's the long-term impact? This is the big question puzzling UK law firms today, according to Oliver Tromp, Actionstep's UK regional director

There is no doubt Covid-19 accelerated the digitalisation of law in the UK. Law firms had to make more fundamental decisions about technology, infrastructure and people policies in the space of weeks than they would normally make over multiple years.

If the pandemic was the backdrop to the 'big bang' of law firm innovation, what we are now seeing is a 'big shift'. As firms accept that the longer-term horizon is likely to include a continuation of combined home and office work and the expansion of digital client interactions, they are now making more considered investments in their operating infrastructure in order to support future innovation and standards of client care. However, firms are quickly discovering that the legal technology landscape is not what it was two years ago.

One of the more obvious changes in the UK legal technology landscape since March 2020 has been a string of acquisitions. In a market analysis that we performed this month on 278 mid-size (20+ staff) law firms in the UK, 75% were using technology from one of the three groups behind the acquisitions. Many law firms are understandably nervous about what these acquisitions mean for the medium-term longevity and support of software from these companies, especially when asked to sign multi-year

contracts. If the legal landscape has changed so much in two years, how much more will it change over the duration of the contract?

Firms now want the customisation of their old server-based tools, the flexibility of the cloud and the agility of newer, no-code technologies. The big shift is about the thoughtful adoption of robust software that adapts to the specific needs and variety of practice types within any firm.

What are the key drivers for this?
• Client experience: moving to a more digital model improves client experience by mandating consistency and transparency in relation to client intake, management and communication.
• Future-ready technology: modern, cloud-based practice management systems routinely update their technology, so there's no business disruption or cost required to stay on the most up-to-date technology.
• Reduced security risks: recent law firm ransomware attacks have underscored the need for sophisticated data encryption and routine security audits native to cloud providers.

As the legal sector continues to evolve and define its future, the firms that think long term and keep their clients at the centre of their decision making will be able to leverage the big shift to their advantage. **LPM**
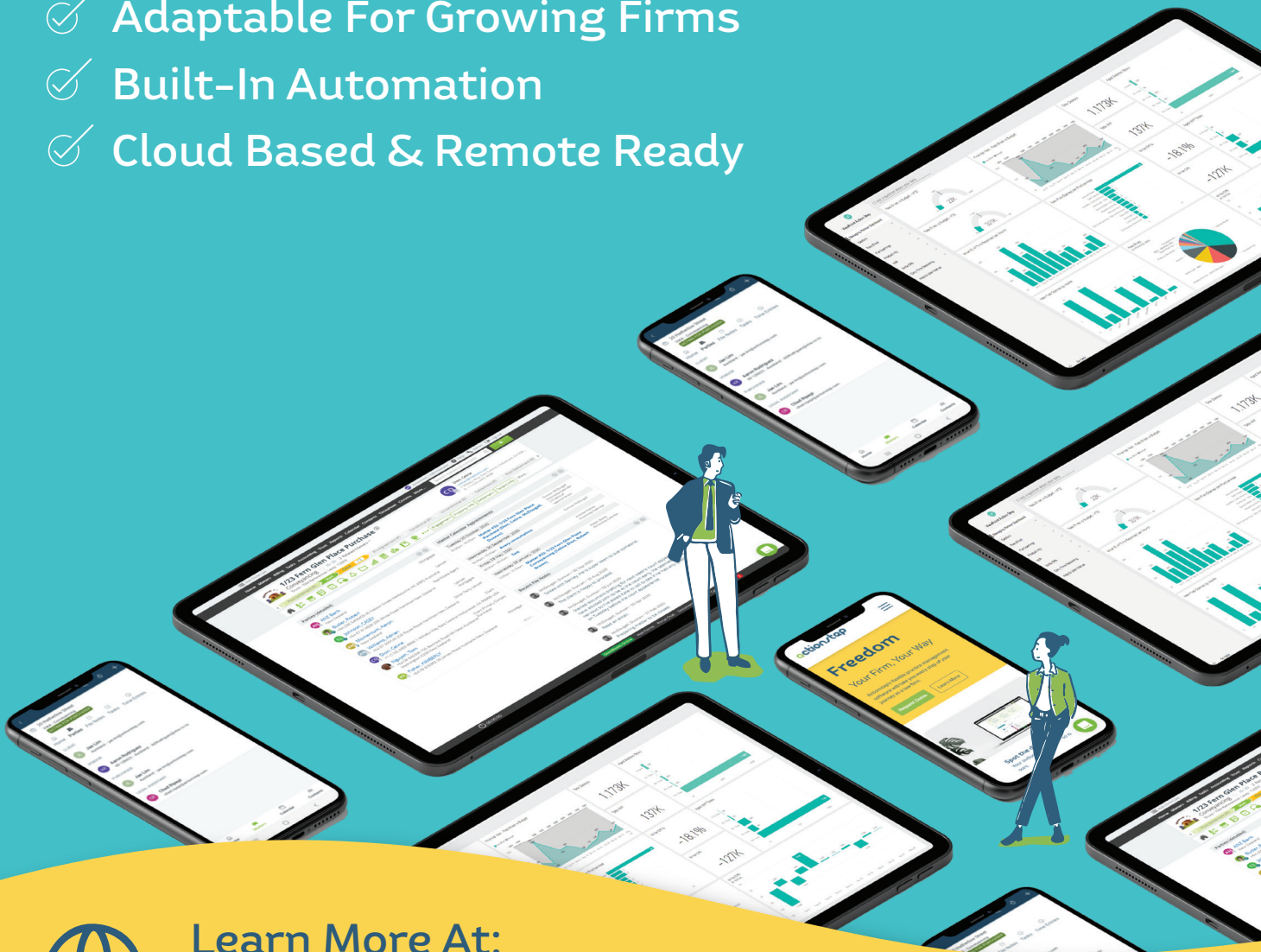
PARTNER IN PMS

Access Legal's newly appointed head of customer success, Bishu Solomon Girma, discusses the company's consultative approach to delivering legal tech solutions, working on the principle that business needs precede a practice management system – not the other way around

Bishu has over a decade of experience in legal – starting out in legal practice before moving to the solutions side of things in 2014. She has since worked in a range of client-focused leadership roles at Deloitte and Epiq, and joined The Access Group in August 2021.

Legal technology piqued her interest early in her career, and she has watched its evolution closely. "Even 10 years ago – when I was using technology to review documents for cases, commercial litigation, regulatory investigations and other areas – it was amazing how many hundreds of thousands, and sometimes millions, of documents would run through these systems, saving hours of lawyers' time. I was clearly able to see the benefit of technology in that space."

Fast forward a decade, and Bishu is helping UK law firms of all shapes and sizes to understand the unique value that a practice management system (PMS) can bring to their firm – beyond the immediate efficiency and productivity gains.

PMS TODAY

"We have come a long way in terms of integrated systems that enable more interactivity and collaboration between lawyers within a firm. The user experience is also significantly improved. It's more intuitive, easier to navigate, provides easier access to documents, and is more efficient when it comes to things like time entry and record tracking, for instance," says Bishu.

A more recent and highly significant development, according to Bishu, is workflow automation within a PMS, and its integration with third-party systems used by lawyers to submit documentation, forms and registrations. "Automation makes it easy for people to get through their case step by step, minimising the amount of repetition or manual entry of information. This doesn't just save time, it also reduces the risk of error, and makes it easier to check the quality of your work."

Such a seamless setup, coupled with a tech-savvy and informed workforce, would be the best-case scenario for a law firm. The time and cost efficiencies that result would free up lawyers to take on more customers, deliver better quality of service, and use a range of data to inform their pricing strategies. It could also result in offering better work-life balance for lawyers, a key point of job satisfaction that is becoming increasingly relevant.

SAME PATH, DIFFERENT OBSTACLES

That being said, progress along the journey towards this ideal varies markedly from one firm to another. "We have customers that are firms with under five users and some with over 300 users. The value of a PMS is not just limited to large firms that use technology as a driver of innovation and strategy – smaller firms need simple systems that are easy to navigate and highly collaborative to get through their day to day."

Expectations from a PMS can differ based on where a firm's IT infrastructure is hosted (third-party cloud or on-premise), and the degree of internal technology and strategy expertise, among other factors. Even among those striving to be more technology driven, a lack of investment ability prevents them from appointing a cloud provider to manage and maintain the entire IT infrastructure. This prompts the decision to manage it internally – despite a lack of expertise – and inefficiencies often ensue.

Another defining challenge is data migration, which requires a "comprehensive project plan to map out all the steps needed to extract data, convert it, and eventually migrate it to the new PMS," says Bishu. Adding further complexity is the prevalence of legacy operating models and volumes of archived and historic data held by law firms. "In some cases, law firms are holding on to data that they don't need anymore, so a data-

cleansing exercise is required to ensure that only the necessary data is being migrated, meaning the new system is more nimble and easier to navigate."

The above speaks to Bishu's experience in solution-building, while her time in practice reminds her of the underlying pressure that law firms are always under when it comes to time management, serving clients and managing internal dynamics. "Law firms need technology to be easy to use, and readily available, all the time," she reiterates – a vision that Access places at the core of its delivery model.

BETTER TOGETHER

"Consultancy is built into our way of working," says Bishu. "We allow customers to tell us exactly what they need, complete with the level of customisation across automation and other key features, and pricing done is in line with those needs."

"Once that is understood, progress is a continuous cycle – we do not just walk away. We check in and see how solutions and automations are working in practice. And if there is any hesitation before implementation, we offer to pilot systems on a small scale first – in one particular department or practice area, for instance – and then scale up when the business case is proven." Support remains on offer post-implementation too. "There are regular check-ins to see if the adoption rate is satisfactory or if people are continuing to work in their old ways and, if so, why?"

In short, Access Legal takes on the role of trusted partner as firms transform their way into the future. Bishu envisions a single, integrated portal that links client communications with a law firm directly with the PMS in the back end, enabling a seamless exchange of valuable data between firm and client in real time.

She paints a picture of what this might look like: "We are all customers of technology in our own way. We probably all have an online shopping account of some kind, for instance, and there is a user and customer experience there. There is no reason why the way in which we experience legal services cannot match the simplicity of those other services that we are getting in our day-to-day lives." **LPM**

There is no reason why the way in which we experience legal services cannot match the simplicity of other services that we are getting in our day-to-day lives.

Bishu Solomon Girma, head of customer success, Access Legal

BEYOND SOFTWARE

Revamping a practice management system today is about more than picking out the right software – it needs the right fit of technology, flexibility and support, among other considerations, says Adam Bullion, general manager of marketing at PracticeEvolve

Law firms looking to implement or overhaul their current practice management system (PMS) are generally faced with a task that can sometimes be quite daunting. There are myriad technological solutions out there to choose from, and while it is imperative to consider the features and functions of each system individually, there are a number of additional considerations law firms must now take into account to ensure their future is secure.

KEEPING UP TO DATE WITH EVER EVOLVING TECHNOLOGY

As technology advances year on year, so too should your business processes. And with physical infrastructure becoming redundant, firms must now adapt to the future of cloud. It's why, at PracticeEvolve, we have developed a native cloud solution for the market, which we are currently trialling within firms in Australia. It's a PMS solution built specifically for the cloud, rather than simply optimised for it.

Solutions that are built for the cloud – rather than adapted to suit – ensure that firms benefit from a faster, more agile development of the software. Whereas firms were traditionally reliant on vendor releases to upgrade their systems, with native cloud solutions, these developments and upgrades are deployed quickly, with less disruption to business. Additionally, the benefits of portability and cost saving make cloud a crucial part of any firm's considerations.

A SOLUTION THAT IS ADAPTABLE TO YOUR BUSINESS

As firms grow in size, they will inevitably require a heightened level of service to ensure users can gain from system capabilities. They may also explore integrating additional technology within any given system. However, if a vendor cannot ensure a firm's complete understanding of the system they are using, are they doing enough? PracticeEvolve operates a per user per month model, where all features and functions of the software are available, eliminating the need to purchase modules. As this gives users access to all areas of the software, we have to take responsibility to ensure users are aware and competent in using the software, and that we empower firms with a level of service that has been missing in the market due to the way in which software has traditionally been purchased.

RECEIVING A SERVICE FIT FOR YOU

Our introduction of client success consultants, alongside our online learning platform – EvolveCommunity – blends human and online resources designed to constantly improve user competency in the software, as well as ensuring firms are fully abreast of news and updates. This ensures firms receive a much higher level of support and tools while also saving them both time and money.

Ultimately, for law firms looking to select practice management solutions, it's imperative the technology, service and pricing model are considered in terms of the firm's requirements in addition to what the software delivers. Only then can you ensure that your future is secured. **LPM**

UN-CLUNKING SYSTEMS

Accesspoint's commercial director, Gary Shaw, talks about how digitalising law firms can optimise their practice management system, rather than submit to pre-packaged solutions that restrict innovation

As the legal profession's thirst for technology increases, an ever growing number of firms continue to express their desire to adapt and develop enhanced benefits from their practice management system (PMS), with few knowing quite where to start on their journey.

The emergence of new legal apps and software have led many firms to rush into investing in technology-led solutions, which might look great on paper, but in reality could end up causing more damage than they're worth. This array of available technology can often have a short life span within firms, as they fail to fully adapt to the long-term vision of the legal work they are trying to support. Not only can investments take up months of implementation time, they can also fail to work with existing systems and the workflows that are in place, creating disjointed environments within the firm for the team and ultimately the client.

It's no wonder that firms are beginning to understand that, to fully leverage their PMS capabilities, they need to step away from what is currently available. Tools that have been created to fit one purpose or linearly perform a single task can be hugely constraining and need full consideration against a more client-led, dynamically capable solution that will truly utilise your PMS in every department, and change how your firm captures strategic insights, increases productivity for the team, and improves client work.

Application programming interfaces (APIs) have started to change the face of that familiar but disparate array of off-the-shelf and sometimes bespoke clunky products, by wrapping most of these into new portal type environments and providing a platform for product integration. Such platforms are the future for all forward-thinking law firms, housing a collection of bespoke and intelligent products, designed for firms that seek to fully maximise their PMS.

Think about how a legal platform could enable your law firm to become more efficient through the new generation of automated accurate data input – from client onboarding to billing and the quality of real-time reporting functionality. There's much to gain. Imagine being able to retrieve this important information through your very own secure portal – where matter updates, project status reports, knowledge and insights about cases, as well as billing information, documents and reporting information are all accessed and viewed securely and remotely. When you pair this with greater use of automation through innovative workflow tools and legal software, your firm will soon be on its way to working smarter and not harder by cutting out countless steps and manual work.

Additionally, the benefits of a legal platform will reach all departments including marketing, as your website can also be linked to your legal platform to open a whole new wealth of possibilities. Data injection from web forms, digital marketing campaigns, online journey tracking, revenue figures, conversion rates and more can all be made available and easily stored and recorded in your PMS and portal offering.

With the push of more client-centric and joined-up thinking, finding out how to truly leverage your PMS is closer than you think – keep an eye out, as I am sure you will want to be one of the first firms to discover the opportunities ahead. **LPM**

Innovative Legal Platforms

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GUIDE TO IMPLEMENTATION

A keen eye on business strategy and people is key to successfully implementing a practice management system, says Chris Pucci, CEO at Osprey Approach

An effective practice management solution (PMS) provides the digital foundation for successfully running an SME law firm. The powerful features and automation tools in a PMS impact all areas, departments, and roles across a practice, ensuring operational efficiency and profitability. However, this means undertaking a new PMS implementation or evolution project can feel overwhelming – with so many possibilities and opportunities, it can be difficult to know where to start.

This often presents two common scenarios for firms:

1 A system is implemented to fix or solve an initial, immediate challenge. Once executed and the initial benefits are realised, momentum stalls and processes, features and tasks aren't continually reviewed, adapted, or improved upon beyond the initial problems. This results in stagnated benefits and a high-cost outlay with little return.

2 Firms expect too much from initial implementation and attempt to overhaul their entire operation. With too much change and training to navigate, and not enough dedicated resource to the project, employees become overwhelmed and unmotivated, feeling as though the process is happening to them rather than with them. This can lead to resentment and fear of technology, and employees quickly fall back to old and trusted – albeit inefficient – processes.

Both scenarios can prove costly for a firm – initially in resource for implementation, but also over time as the system is unlikely to reap the rewards expected from original investment. This is often because the PMS investment is too heavily focused on technology, without a clear aim and objective for the wider firm and business strategy.

How SME law firms can get the most out of their practice management solution is by focusing on their people and business goals. This means the work involved in implementing, or improving upon, a PMS starts long before looking at the software itself.

PEOPLE MANAGEMENT AND BUSINESS STRATEGY

Traditionally, people management and business strategy haven't been the top priority focus for SME law firms. But when it comes to maximising success and return from any technology investment, it's those who focus on those two things that come out on top. Implementation, and importantly utilisation of technology and software, can't be effective without a change in internal mindset, culture, processes, and skillsets. Therefore, the project and investment require upfront, effective change management and cultural shift for success.

No matter how big or small a change is, managing a team through a switch isn't easy. People often resist change. But the key to unlocking success is clear communication and inclusive collaboration among management, departments, stakeholders, and employees, as well as between a firm and software partner.

To get the most from a PMS, firms first need to define and communicate clear business goals and objectives, so it's obvious what needs to be achieved. Define the end goal and what you want to ultimately achieve, and then be honest about where you are today in that. It's important that firms then consider how realistic is it to meet those goals within agreed timescales.

A TRUE PICTURE THROUGH COLLABORATION

A realistic picture of how a firm is currently performing can't be obtained solely by management, stakeholders, or siloed teams, but

through firm-wide collaboration. Depending on the size of the firm, this may be completed in one group, or perhaps first communicated in departments and smaller teams and then communicated back through team leaders or spokespeople. Either way, it's vital that those on the ground who will be using the software daily to manage their workload are involved in the initial brainstorming and scoping sessions. Not only will this aid adoption further on in the journey but it will highlight where firms will gain the most impact and return from a software solution.

DEDICATING TIME

With goals, current challenges and wishes defined, it becomes clear how the software can help a firm, creating the best position to outline a plan to change and improve. A key resource in maximising the return on your software investment is dedicating time to training because the technology can only ever be as good as the people using it, so again, it's vitally important that staff are honest about their training
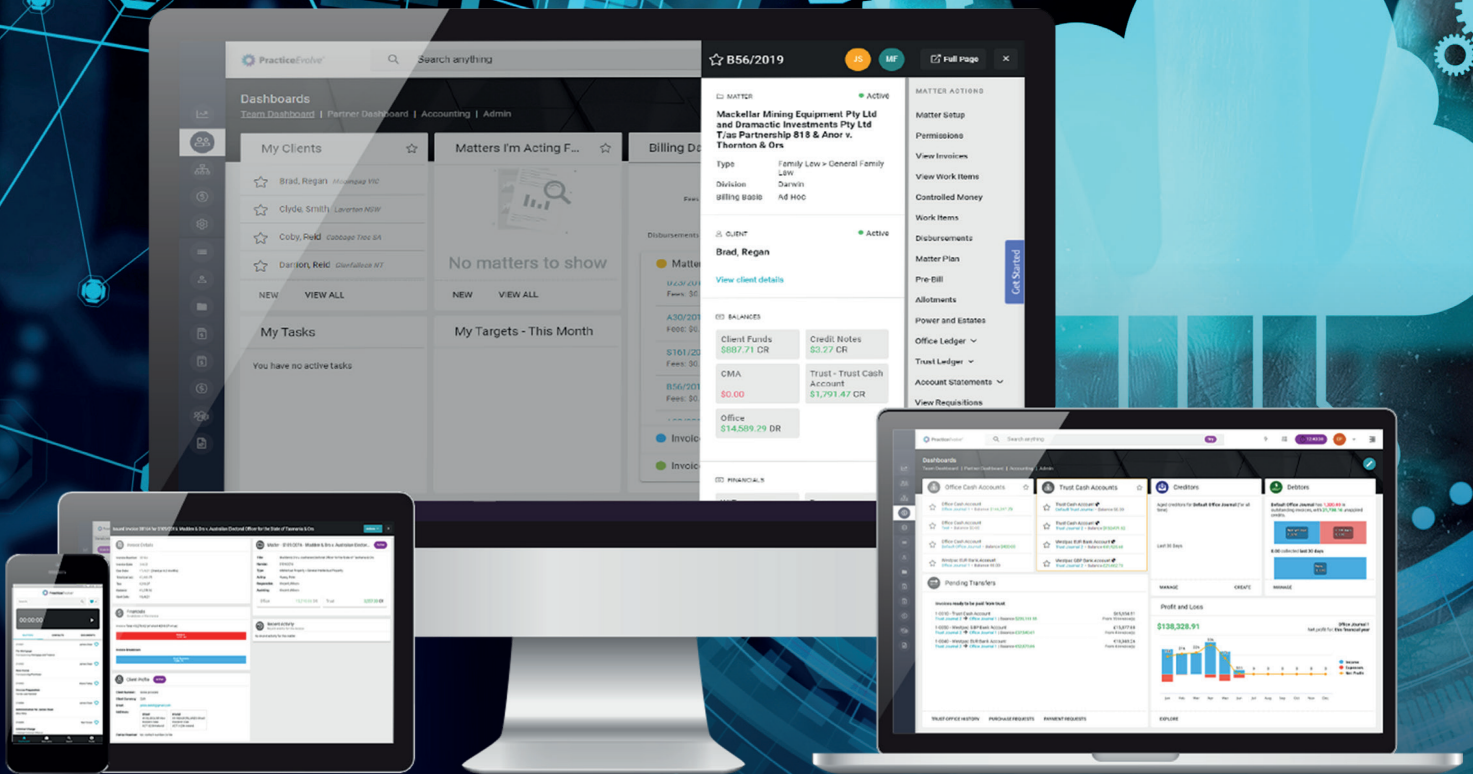
requirements. Confident users will be able to take advantage of the software above and beyond its basic functionality to improve their daily workload.

To get the most out of the process there need to be software champions who are focused on driving accountability and momentum across the firm. Without leadership to continue to inspire and empower employees, it's easy for the two scenarios mentioned above to resurface.

CONTINUED SUCCESS

Effectively communicating goals, promoting inclusive collaboration, and allowing dedicated time for training empowers people to fully take advantage of the tools on offer. Collectively working towards the same objectives and realising the benefits of a PMS instils a mindset of continuous improvements and adaptability. Adopting this approach will enable SME law firms to realise that their PMS is an investment, not a cost, while also ensuring the solution continues to grow with their company – enabling it to perform at its best. **LPM**

DEFINING CHOICES

Peter Ross, practice management system consultant and integration designer at Report Factory, answers key questions on choosing the best strategy for a system overhaul

Most firms purchase a new practice management system (PMS) about every 10 years. It seems to take four years to get on top of a new one, three more to get bored with it or outgrow it, and two more to get organised, decide on and implement another.

No PMS will fix a bad business, but it can hamper a good one. Make sure you know what business looks like for you now, and that you have a best guess of the future before you embark on a change. Always remember that if you automate a mess, you just end up with a very fast mess.

Solutions and opportunities usually come from good process designs, good business ideas and opportunities. It's absolutely true that some elements of some PMS can spark better processes and ideas, but you need to recognise the ones that will work and the ones that won't. Important safety tip – ones that mirror what you currently do are probably not the best idea, even if they make it easy to convince others as a low friction purchase decision.

So, should you look for a single PMS application (a one-box solution) that purports to do everything, or buy a collection of applications that are more specialised? It's a really difficult question, and there's no single answer, but maybe I can help you think it through a bit.

Buying a single system is attractive – one vendor, one data conversion, one implementation across all parts of the firm on one day. Sounds simple enough. But like all applications, it's designed from a certain perspective, and if you don't fit that perspective – in every single module of the PMS – you might come across some issues. Such systems are usually very good in a couple of areas, and mediocre/adequate in others, when assessed from your perspective.

Buying the best of breed (or a best of breed) for the key application areas that you're focused on (right now) has the advantage of you selecting each application area designed from a perspective that matches your focus (for that area). Indeed, you can do this over a period of time, bring on (and retire) applications or modules as the business grows, changes and sees new opportunities. Integration is hard (but getting better) and dealing with multiple finger-pointing vendors is no one's idea of a picnic.

We've seen PMSs over time with a focus on, for instance, insurance law, which do that part of the work brilliantly, yet the underlying financials are poorly handled. We've seen great financials and excellent structures in database design, but the user interface and functionality of the time recording piece is horrible. We've seen conveyancing systems that do great document assembly with exceptionally poor time tracking
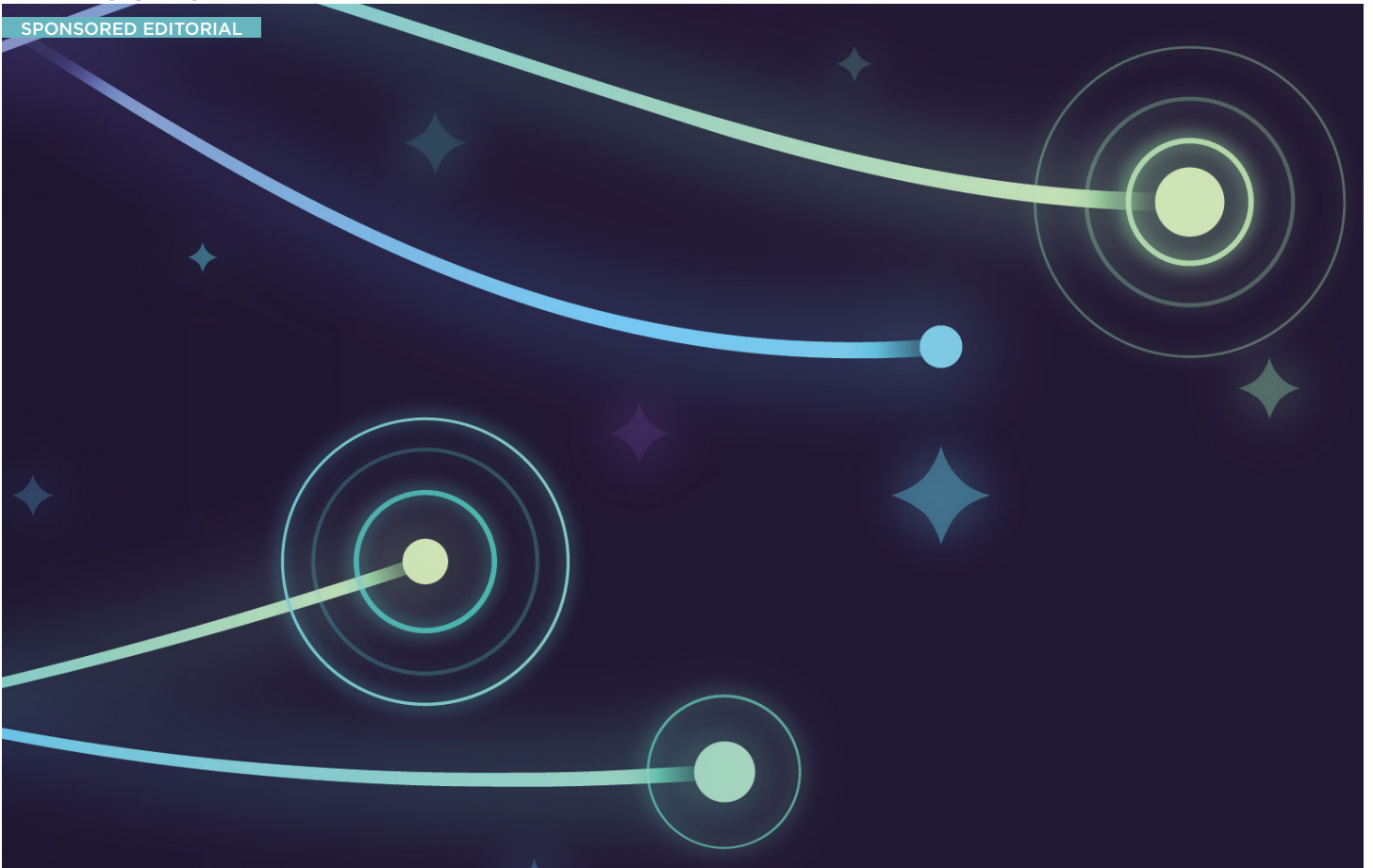
and audit trails. And, of course, we've seen a large number of modern systems that do most things adequately, but can't be called great in all areas.

The choice for you is: do you want your firm to have adequate systems, and be by definition an adequate firm, which is perfectly fine – or, would you like it to be exceptional in multiple areas and pivot quickly with specialised solutions to specialised issues, and also carry the baggage of multiple vendors and integration? It's not a straightforward call, ever.

For firms of the size targeted by this special edition, my view is starting to crystallise. Assuming you're coming from a one-box solution, you should be looking for a new one-box solution, which is a step up and has a few key super solid areas – ideally the financials and people/clients side of things should be bulletproof. You should accept there will be inadequacies in some areas as it pertains to your practice and actually plan over time to add specialist solutions that replace elements of your new one-box and integrate with it, and ideally vice-versa. That integration piece is super important, and it is getting better and easier.

In that way, you are being realistic, and yet not creating a project that you can't finish (although a really good PMS is never finished in our opinion!). You accept some failings and focus on key strengths, realistically planning a way forward in more specialised solutions as and when you outgrow some of the less glowing aspects of the one-box solution. What's critically important is that you don't reject a one-box solution on the basis that it doesn't meet all of your criteria, particularly if it meets the super important ones really well.

Integration is critically important in almost all solutions, but in the best-of-breed scenario, it really needs to work exceptionally well. Many firms already use third-party time recording solutions and the integration of these to the main PMS has to be accurate, timely and auditable. Moving into more integrations like task and matter project systems can get more complex again. Luckily there are great integration tools available now and while they all have positives and negatives, a good integration solution can usually be architected. Ideally though, you want to design and specify the bones of your integration tools and solution when considering the initial PMS up front, as some systems have better application programme interfaces (APIs) than others. This can make the difference between screaming success, and just screaming.

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Peter Ross, PMS consultant and integration designer, Report Factory

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Report Factory employs (only) qualified accountants who work exclusively in professional firm finance and workflow technology and reporting and data analysis.

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WHY INTEGRATE?

Practice management software is a valuable tool for law firm managers. When you add the power of document management to the mix, everything fee earners need for working on a matter is right at their fingertips, according to Sam Dobson, account manager at NetDocuments

A practice management system (PMS) provides an important foundation for managing your practice, including organising administrative tasks, streamlining processes and workflows, and simplifying invoicing and billing.

But where do your fee earners spend the majority of their day? In documents, which makes a document management system (DMS) like NetDocuments the perfect companion tool to your PMS.

Here are five key advantages your firm can enjoy when you integrate a PMS and DMS.

1 One confirmed source of truth. If your documents are scattered and there are multiple places you have to go to understand what is happening on a matter, you are wasting time and introducing a level of risk that is unnecessary.

When your DMS is the single source of truth for all matter-related documents and emails –

and chats within Microsoft Teams – your DMS becomes the one place you go to find and collaborate on exactly what you need. Have confidence that you're always working on the correct version in the most secure way.

"We've got one version of the truth now. Our practice management solution and document management solution are completely integrated, so you're always talking on the same base of data with everyone. And it's version-controlled with the right security and access," says John Turner, Ellisons' chief operating officer.

2 Easy access to everything you need. Digital files in your PMS take the place of paper files in so many ways – contact information, identifying the roles people play on a matter, calendar information, matter-specific information, time and billing records and so much more.

When you integrate your PMS and DMS, documents and emails related to a matter are
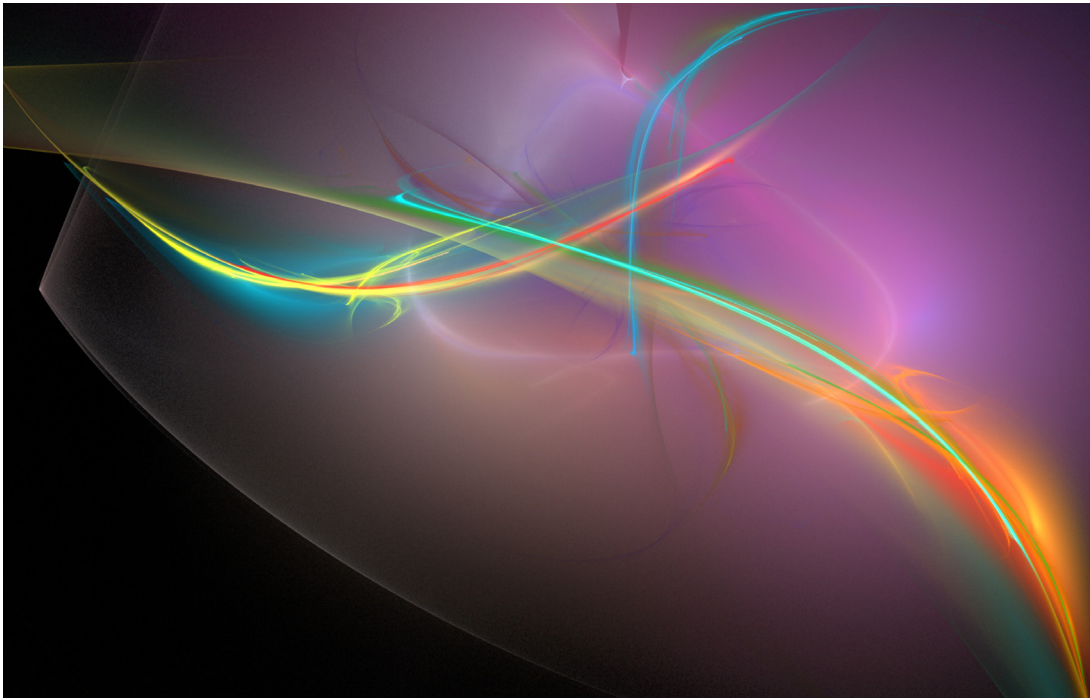
organised, easy to find and secure. With NetDocuments, the native cloud platform allows people to work where they want, whether in email, documents, or web browsers. It's all connected in your once source of truth.

3 Create documents faster. Document templates make it possible to skip the repeat work of document formatting or remembering where you saved a recent version. This increases productivity. When combined, practice management and document management software make it easy to leverage these templates to your advantage. For example, in a PMS, you can set up templates to automatically pull in matter information, ensuring documents are created even more quickly, before saving final files in NetDocuments. Remember, this all happens seamlessly, without having to jump from system to system.

4 Find exactly what you need quickly. Clients have told us they spend at least 30 minutes a day looking for specific documents and emails. With NetDocuments search, you get the full power of Boolean searching, which can immensely cut down on the time spent locating documents.

   Think about how you have used your legal research tools over the years. What if you could use wildcards, and/or/not operators, criteria such as 'within five words' and quotes to find exactly what you are looking for in your document repository? If that is not enough, you can filter your searches by date, document type, client, matter and author. And whether you're working in documents or email, you can easily see items you've most recently worked on or flagged as a favorite.

   Having the ability to leverage your document repository in this way eliminates the need to reinvent the wheel, prevents time wasted searching, and encourages team members to contribute everything they create into NetDocuments.

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> *Whether your firm is implementing a new PMS, evolving your current solution, or making the most of what you have, legal leaders need to consider how document management would level up their legal practice management*

Sam Dobson, account manager, NetDocuments

5 Log time with a single click. When you integrate practice management and document management, logging time can be as easy as clicking a button. For example, documents stored in NetDocuments can be listed directly within your PMS — and a time entry for the work spent drafting, finalising or reviewing a document is one click away. This type of feature is one way to ensure your timekeepers can efficiently log their hours to the matter.

IT TAKES COMMITMENT

Leveraging technology to think differently about how work gets done comes with many rewards, as well as a commitment to going about change in the right way. Whether your firm is implementing a new PMS, evolving your current solution, or making the most of what you have, legal leaders need to consider how document management would level up your legal practice management.

   Together, the benefits of your PMS with a powerful cloud first, cloud only platform like NetDocuments gives your people the tools they need to do their best work and provide clients with secure, high-quality work product. **LPM**

We are the connection between your I.T team and your finance team

How about spending lots of cash on a new PMS, disrupting your firm for 18 months, and ending up more or less where you started?

No? Didn't think so.

Many firms do that by assuming the software itself is where the value proposition is. It's not. Don't get us wrong, you do need the right software to make big important changes, but the software is merely an enabler for real change. That change has to come from you, and we can help you make it.

At Report Factory, we're experts in selection, deployment, integration and training of legal software solutions. We challenge, focus and design processes, key metrics and reporting solutions to make a real difference to the operational focus of your business.

Every member of our team is a qualified accountant and most importantly every consultant understands legal PMS software and technology inside & out. We'll work closely with your finance, management and technology teams to carefully understand the requirements across the firm.

We make a real difference, real fast.