



SEPTEMBER 2022

# LPM

LEGAL PRACTICE MANAGEMENT

## People first

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**People lie at the heart of all strategic considerations for law firms, from their purpose to the technology they use**

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### **BUSINESS ON PURPOSE**

A guide on 'making a positive difference' to your people and clients

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### **FUTURISING WORK**

A story of modernisation, optimisation and cost-saving

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### **REFLECTING ON MERGERS**

Notes from a series of successful mergers and acquisitions



# Welcome

LPM has a new look and feel, and we're focused on what's most important – people

Welcome to the first edition of the new quarterly LPM magazine – a curated mix of long reads researched by our editorial team, resources and opinion pieces supplied by business leaders in the SME legal community, and insights from companies that serve the legal sector on a daily basis.

Our plan is to develop and augment this magazine each quarter with more content packaged in diverse and innovative ways – the fundamental objective being to hear more from you as a community.

Inspired by animated conversations among our audience, the agenda for this issue is people – how can law firms create the right environment for their people to thrive in a productive and sustainable manner? We cover recruitment, purpose, culture, automation, and a host of other salient topics.

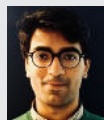
There's a lot more to look forward to – keep an eye out for a regular stream of short, digestible video content on the latest issues in legal practice management and stay tuned for the imminent release of the LPM app.

And as always, do get in touch if you have a story to tell, if you want to join any of our virtual or in-person events, or simply for a cup of coffee and a chat.

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# Reflecting on mergers



Meticulous planning and prioritisation can help navigate complex mergers, says Tony Fisher of Fisher Jones Greenwood

Over the last ten years, our firm has acquired four other firms and been acquired itself in a private equity buyout in July 2021. As a management challenge, integrating another law firm with its own history, systems and culture is really quite daunting, as many firms have found during the same period.

The essence of a merger is a coming together of two groups of people with their own outlooks, their own ways of doing things, their own values and beliefs and their own attitudes to clients and to each other. Individuals in the acquired firm will be nervous, suspicious, feeling insecure and unconvinced of the merits of any merger.

Making a success of it requires a whole range of skills and all of those skills need to be brought together to plan the merger long before it takes place. A lot of what the acquirer needs to know is in the heads of the staff, who you can't talk to before the merger has happened. Due diligence is essential but not adequate to address all of the issues that will be faced post-completion.

So how to manage these disparate challenges? Our own firm has developed a detailed project plan

with hundreds of tasks and sub-tasks across issues relating to people, premises, systems, data, marketing and communication (both external and internal), the SRA, the LAA, other processes, contracts trading and insurance, and accounting and banking. These are entirely separate from the negotiation of any terms for the 'deal'. The key to success is evasive. Fundamentally, it's all about picking the right target firms by profiling their people, their work, their attitudes (at partner level at least) and their own vision for the kind of firm that they want to be part of.

Many smaller firms are running for the cover of a properly functioning management team so that they can concentrate on their own professional work and leave behind the complexities of running a business themselves.

It may be a generalisation, but my own experience is that most lawyers want to leave management to others (even if they don't appreciate the value of those management skills themselves).

**Read more notes from a successful series of mergers on the LPM website**

# Expect the unexpected



Unforeseeable events and costs can, and do, arise to put pressure on best laid financial plans, says Mike Stevenson, managing director at Iceberg

A situation recently sprung up in Manchester when the Crown Court was suddenly forced to close so the building could be tested for asbestos. What was expected to be a five-day closure soon became two weeks of delayed or reorganised cases. Not even the most assiduous firm would plan for such a specific eventuality, but it could still impact a firm's business schedule and may well delay payments from clients. Suddenly, and out of nowhere, a well-managed firm may have a cashflow shortfall through no fault of its own.

That the unexpected closure of Manchester Crown Court follows soon after Bolton Crown Court had to adjourn due to the risk of new lights falling down speaks to the uncertain environment in which law firms today operate!

It isn't though just the unpredictable, knock-on effects of crumbling building infrastructure that can impact a firm's balance sheet, or even just negative news. A firm experiencing sudden growth in its client base may need to expand its team, and with a growing team comes the potential costs of acquiring Practising Certificates.

Also, rather than simply wishing to expand its existing team, a firm could

unexpectedly be presented with the option of acquiring another: A great opportunity that they may not wish to miss, and one for which there are financing options available.

These are both positive developments that may have been unforeseen six months before they became a reality, and firms may wish to seek financial support to ensure that they are able to make the most of these unexpected opportunities. Firms seeking such support can take comfort in how common a practice it is to seek financial support, whether it be over a period of months or years. What may seem to some as a sign of failure to be prepared is in fact simply an entirely routine feature of sound operations.

**Read more about the history of automation in the legal sector on the LPM website**

## ICEBERG

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# Valuing people

Strategies for cost-effective recruitment, sustainable retention, building a pipeline of talent for the future and more, as explored by Aftab Bose, editor, LPM

It's no secret that people-related challenges – labelled variously as 'talent attraction and retention' issues, 'the great resignation' or even the more recently popular 'quiet quitting' – have put significant pressure on organisations worldwide since the pandemic. And UK SME law firms have certainly felt the impact – of the first two phenomena at least – as is evident from LPM research in 2022. In our flagship report – LPM Frontiers – released in the spring, 78%

of business leaders at SME law firms identified 'recruitment challenges' as their top strategic change consideration for this year.

But the labels strewn across commentary on the subject and used as singular survey responses are pulling a lot of weight – clubbing together all the complexities that come with recruitment, training, management, retention and other facets of a successful workforce. Firms are grappling with the pain points and

costs that come with each of these feats, all amid an increasingly volatile economic backdrop.

This article checks in on the world of people-related challenges in UK SME law – to see how they're evolving with time and how firm perspectives and responses compare.

## THE RIGHT FIT

A healthy level of attrition can be conducive to growth and innovation, as long as it coincides with a steady influx of new talent. But the latter has been far from certain for SME law firms in the past year.

"We haven't been directly affected, but there has been a mass exodus from the professional services sector over the last

two years. Many of these departures were of more senior individuals, who either opted for an early retirement or altered their career and professional ambitions. The upshot, being felt across the country, is a shortage of talent with more than a certain level of experience," says Alison Lobb, managing partner at Morecrofts.

Derek Rodgers, managing partner at Gardner Leader reports that "finding the right people for certain roles is taking longer than usual," while Simon Boyden, chief financial and operations officer at Lee & Thompson, adds that CVs for all experience levels are in short supply.

However, all firms are not experiencing this equally. "The market seems to have livened up quite a lot recently, at least in our area," says Emma Sell, chief operating officer at London-based law firm Fox and Partners. "There is plenty of movement, and a lot more candidates are coming in for each position. Perhaps it's the timing – with the summer coming to an end – but it has certainly picked up," she adds.

A range of factors – from specialisms to location, among myriad others – could contribute to varying experiences from one law firm to the next. Still, despite receiving a better response to job openings, Sell agrees with other leaders on the point that there is a dearth of candidates that fully fit the desired profile. "We're a small team and we want to make sure we bring in people who are the right



fit and have strong technical capabilities. That has proven to be difficult,” she says.

“Bigger firms have been on a growth drive and have scooped up a lot of the more experienced talent in the country, leaving less for the SME segment and those firms operating outside the big cities,” adds Rodgers, offering one potential explanation.

The economic context isn’t helping. “Talent availability was at an unprecedented low, and the talk in the media of a potential recession may further discourage movement in the market. And while that could be deemed by some as suitable from a retention perspective, it could further shrink the prospect pool,” says Nicola Mason, HR director at Napthens.

### ROUTE TO RECRUITMENT

A considerable amount of time and resource goes into finding the right fit – either by scouring the market for prospects or sifting through a glut of CVs. Many leaders rely on third-party recruitment agencies, although some point out these services are increasingly costly as supply issues persist.

“Recruitment fees have soared to more than 20% of salaries in many cases, which is a hefty price to pay but a necessary one for us. We’re quite a small firm, and screening people is very time-consuming, especially if we have advertised online. People with no relevant experience can just apply with the click of a button



without thinking twice. And it’s mostly recruiters who get in touch anyway,” says Emma Sell of Fox and Partners.

“Recruiters are very helpful in that they screen people for us, but working with them is not without its challenges. They don’t always listen carefully to the specific needs of our firm, and it can be time-consuming to go back and forth when trying to fill a position. Plus, paying a big fee is a significant gamble – we need to be absolutely sure that a candidate is the right fit for the role, otherwise it’s quite a loss.

“There are ways to mitigate the risk. We negotiate terms with recruiters to get some or most of the fee back if a person leaves within a certain window. On the

whole, cultivating a good relationship with one or two trusted agencies is the best way to ensure your needs are met.”

Alison Lobb of Morecrofts presents a nearly identical assessment of advertising jobs online and via jobs boards. They either lead to droves of irrelevant responses, or prompt agencies to get in touch.

“As such, we do set an annual budget for recruitment fees, which are rising all the time at the moment. But we make sure to negotiate the fee upfront instead of accepting any quote from an agency. And in many cases the fee is refundable if you realise fairly quickly that a person isn’t the right fit, so we make a point of evaluating suitability as soon as possible,” says Lobb.



“On the whole, cultivating a good relationship with one or two trusted agencies is the best way to ensure your needs are met.”

**EMMA SELL, CHIEF OPERATING OFFICER,  
FOX AND PARTNERS**

“Beyond that, it’s important to have a good relationship with recruiters, because agencies that don’t know your firm will look to push all candidates – suitable or unsuitable – in your direction. Having a relationship also helps to manage the



cost, although sometimes, if you've found a good employee to bring on board, it's important to accept that there will be a large fee involved. It can certainly be worth it."

Derek Rodgers of Gardner Leader takes a similar view: "I think we have to accept that this is the price you pay to get the right people."

At the same time, while agencies are an effective recruitment tool, some firms are employing other strategies – in the short and long term – to reduce their dependence on external parties and build a strong pipeline of suitable candidates.

One option is simply to move the recruitment function in-house to work alongside the existing HR department –



**"Having someone internally will be more cost-effective when considering our hiring ambitions against the backdrop of current recruitment fees – we'll be cutting costs even if a third of our new recruits come through the new business partner."**

**NICOLA MASON, HUMAN RESOURCES DIRECTOR, NAPTHENS**

an increasingly popular strategy. "For a long time, recruitment sat on the 'side of the desk', but we've realised that we need someone who can really devote time to building a talent pipeline. This entails cultivating a healthy relationship with recruiters, connecting with prospects and passive candidates in the market, and working with the marketing team to build an employer brand online through targeted recruitment campaigns," says Nicola Mason of Napthens.

"We're bringing a talent business partner on board in the fall to manage these responsibilities in addition to a renewed approach to screening applications. We will likely still have to rely on external recruiters because we're on a large growth journey and will be hiring quite substantially. But having someone internally will be more cost-effective when considering our hiring ambitions against the backdrop of current recruitment fees – we'll be cutting costs even if a third of our new recruits come through the new business partner.

"And beyond the considerable saving on fees, an internal partner will work closely with us to find a good and more sustainable fit for our team, which means lower attrition rates and consequently less downtime and recruitment spending. Even if it's not a direct cost-saving measure, it's certainly a cost-prevention one, which is just as important," she adds.

This approach has also been tried and tested – and fruitfully so – at law firm Ellisons. "We have ambitious growth plans that are on track, a lot of which can be

attributed to our hiring," says Lizzy Firmin, Ellisons' HR director – soon to take over as chief operating officer.

"We have a business partner within the HR team who is a recruitment specialist, and hiring has been the majority of their role since joining. Investing in that dedicated internal resource, rather than relying on lots of different agencies and fitting recruitment around other responsibilities, has helped us develop a coherent strategy and has effectively paid for itself.

"There are still occasions when we rely on external recruiters for certain roles, but the majority of our recruitment now happens directly via the internal resource – a significant saving considering how expensive it is to go through agencies."

But specialist recruiters – whether internal or external – are not the only path for attracting quality talent. Some have had more luck than others online. "We've gone down several avenues to mitigate the cost pressure from agencies, including advertising directly on our website and social platforms such as LinkedIn. And we've been very successful doing so," says Simon Boyden of Lee & Thompson.

"I think firms would be wrong not to look online – the candidates might not all be relevant, but we've found a few very strong options there. Essentially, it's just about spreading your net as widely as possible to make sure you've searched the market properly yourself – rather than solely using recruiters.

"And advertising on our website is particularly effective. Many times



candidates recognise that we want to bypass the intermediary, and come directly to us, which is extra encouraging because it signals a specific interest in our business.”

Boyden confirms that referrals from within the firm and its wider network are also very reliable ways of finding the right fit – an approach that is also vouched for by Derek Rodgers at Gardner Leader. “We’re very transparent with our search for new people – we make our own people aware of the profile that we’re seeking, and a lot of our new hires come from referrals. In fact, we ask people to keep an eye out for prospects even if we’re not specifically searching – we’re open to evaluating whether a person would



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**SIMON BOYDEN, CHIEF FINANCIAL AND OPERATIONS OFFICER, LEE AND THOMPSON**



add value to our team at any point,” says Rodgers.

“We’re quite active on LinkedIn and other social platforms too – not only to advertise jobs, but also to portray the kind of firm we are and highlight why people love working with us. Plus, as finding people has become more difficult in recent months, we’ve turned to these platforms a bit more to make approaches and see who might be available,” he adds.

#### **BUILDING FOR THE FUTURE**

Whether through the use of recruiters, referrals or online platforms, firms have developed their own strategies to meet immediate workforce needs. But the prevalent uncertainty of recent years has

also sparked innovative approaches to building a secure pipeline for the future.

Nicola Mason of Napthens says: “We recently ran a specialisms programme at the local university to inspire young students to think in a detailed way about their future. As it stands, universities don’t examine the nuances of different practice areas such as specific areas of employment, immigration or corporate law, for instance. We tried to bring more detail into the fray. For example, if a student is interested in litigation, we discussed whether that specifically meant commercial property litigation, contentious probates, intellectual property litigation, or anything else.”

“This makes it easier to recruit

specialists in the future, which is a real need for us and the legal sector as a whole. It’s certainly a challenge, with a longer timeline, but it’s the right thing to do, and our people are happy to make time to help develop future talent.”

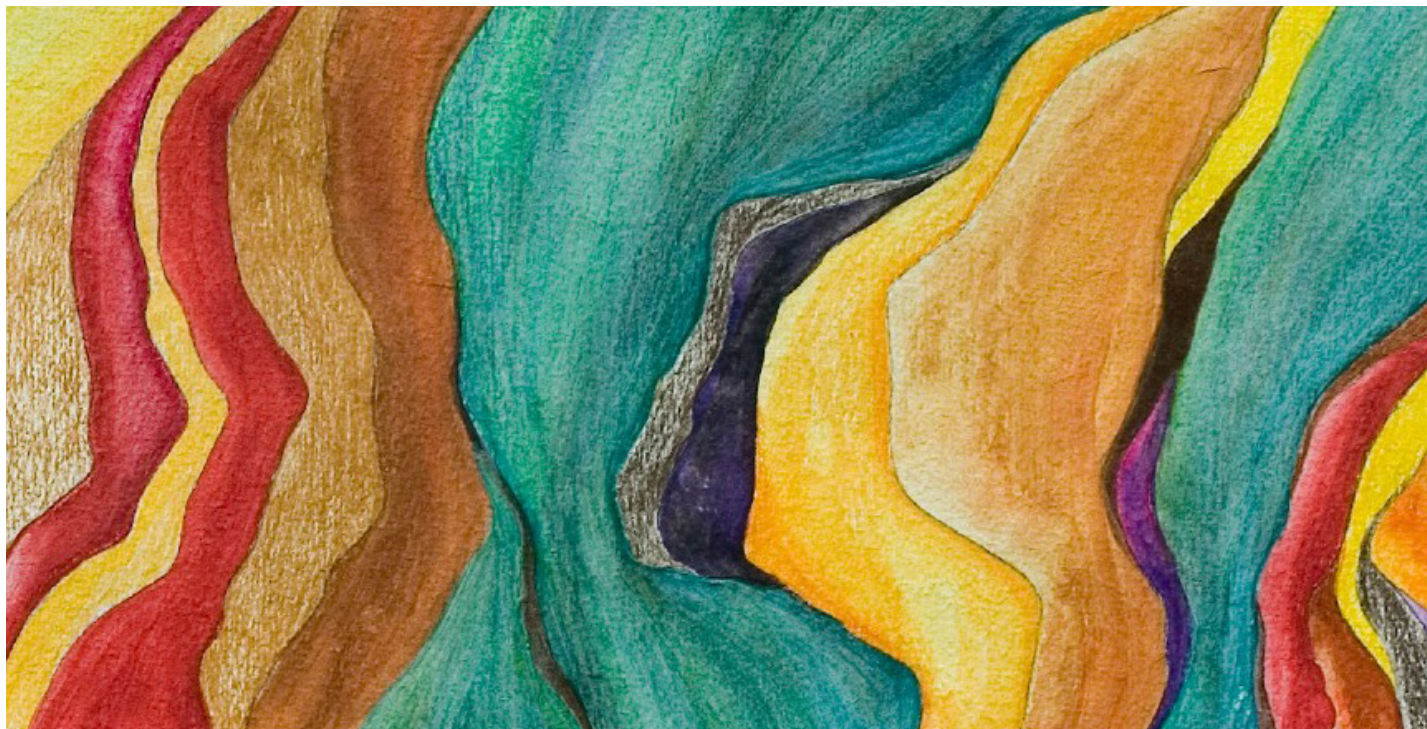
Others have a more direct training pipeline. “Our focus is to grow organically and develop our junior people, and it has been successful. We recently had three new members join one of our practice areas, all of whom qualified with us over the last six months,” says Lobb.

#### **ALL HANDS ON DECK**

Organically or otherwise, law firms run the risk of investing in finding the right people and then losing them to other firms two or three years down the line – resulting in widespread instability in the workforce. An unsatisfactory return on investment, loss of productivity, and a new, expensive recruitment process are all products of frequent departures.

“The ‘job-for-life’ ethos fizzled out a long time ago – the norm today is to move around for a variety of factors,” explains Nicola Mason at Napthens.

Alisson Lobb at Morecrofts adds: “Younger professionals have student loans to pay back and are looking to climb on the property ladder and settle down. Money is their chief aim at that stage – so they’re either moving to higher-paying jobs every two to three years, or leveraging other offers to get a pay increase.”



“At the same time, once they’ve been on this journey for a few years and made substantial sums of money, they tend to reach a plateau point and question what it is that would really make them happy. Quite often, that is the point at which they come back to us.

“We’ve accepted that we can’t compete beyond a certain point in the wage arena, but we are very keen on wellbeing and work-life balance. Some people leave us assuming that the grass is greener elsewhere, but soon realise that a bigger paycheque isn’t worth giving up the support and understanding that they receive with us,” she adds.

Offering flexibility, a better work-life balance and a supportive environment

does appear to play a decisive role in retention. In the Bellwether 2022 report produced by LexisNexis in partnership with LPM, legal professionals were quizzed on what their biggest motivation would be if they were to move jobs this year. Cited by 45% of respondents, work-life balance is clearly the most decisive factor.

Simon Boyden of Lee & Thompson reports that his firm has managed to escape the wave of departures that has swept across the sector. “A lot of our people have come from larger firms, specifically for better working hours and a better quality of life. Of course, this comes with a pay adjustment compared to big city law firms, but it’s a trade-off that most are willing to accept.



“Some people leave us assuming that the grass is greener elsewhere, but soon realise that a bigger paycheque isn’t worth giving up the support and understanding that they receive with us.”

**ALISON LOBB, MANAGING PARTNER,  
MORECROFTS**

“There are other factors that keep people with us. We have a community, almost family-like, environment, which

became even more pronounced during lockdown, and we make sure that any new joiners are a good fit with our values. Just before lockdown, we also moved into a brand new open-plan office with varied workspaces – it’s the type of office that people want to come into.

“Plus, people coming to us from larger firms are enticed by the opportunity to work much more closely with clients and get involved in important and fulfilling work,” he adds.

Lizzy Firmin at Ellisons also reports a low departure rate in recent years, and cites similar factors behind the retention success. “Our employee turnover rate is at a very healthy level, and retention hasn’t really been on our boardroom agenda. We attribute this to the fact that our entire business is driven by our HR strategy – putting people at the heart of everything,” she says

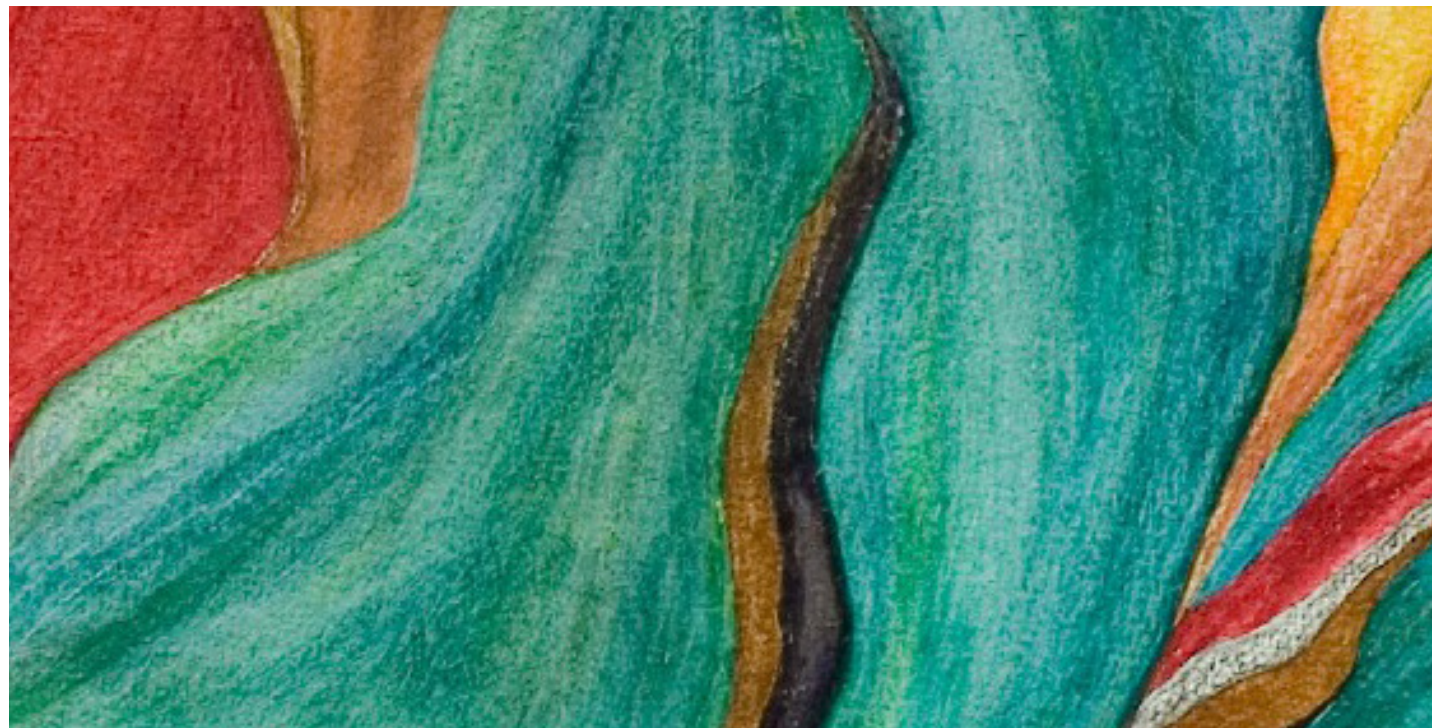
“When an employee comes on board, their first days are very clearly structured and inductions are a priority across the business so that new joiners feel like their arrival matters. We try to support them, reduce stress levels and give them a sense of purpose. People who enjoy their initial experience with a business – whether that’s the first day, the first three months or the first year – are more likely to stay with it long-term.

“After the onboarding and induction is complete, we provide very clear and structured support for colleagues’ career



progression. People appreciate the investment we make in their development.

“It’s also important to have your own identity as a law firm – a set of values such as putting colleagues and clients at the heart of everything we do, working as a team and supporting the community. Job interviews are two-way streets – candidates are evaluating your suitability as a workplace just as much as you’re assessing their abilities. We use interviews to openly speak about values, and when people’s experience matches what was communicated in initial conversations, it’s more conducive to a long-term relationship.”



### COST QUOTIENT

Strategies abound for talent attraction and retention, though the question remains as to how law firms are planning to sustain heavy investments in people as economic circumstances remain uncertain. As discussed, recruitment – particularly buying it as a service – is a growing cost base. So is training and development, while pay demands are also intensifying as a result of inflation and rising domestic costs.

“We’re still planning to invest in our people and look for growth opportunities in the right areas. I expect a bigger demand for pay rises in the next round, having just gone through the process in April when inflation was starting to tick up. For us, it’s about finding a balance

between the right salary level and other benefits – which extends beyond traditional benefits such as pension contributions and medical insurance to things such as shared parental leave, the working environment, wellness, a focus on diversity, and even social and charitable events that help bring our team together,” says Simon Boyden of Lee & Thompson.

“At the other end of the spectrum, we’ve just had a discussion about being confident with rate-card increases. We hope that clients would understand these increases given the macro pressures at play.”

Emma Sell of Fox and Partners confirms that her firm is looking at fee pricing as well: “It’s about striking a

balance between costs and hourly rates, which has to be considered against each individual’s post-qualification experience and salary levels. The aim is to spread costs as effectively as possible across the business.”

And at Gardner Leader, Derek Rodgers points out the importance of careful planning at a time of financial uncertainty: “We always look quite far ahead when budgeting at the start of the year, and we identify gaps and areas where we might need to strengthen. After that, it’s about making sure that we bring the right people in; people who will be able to produce a return on investment quite quickly.”

“At the same time, we also understand that it might take recently onboarded



“It’s important to have your own identity as a law firm – a set of values such as putting colleagues and clients at the heart of everything we do, working as a team and supporting the community.”

**LIZZY FIRMIN, HUMAN RESOURCES  
DIRECTOR, ELLISONS SOLICITORS**

people a bit of time to produce returns. Irrespective, investing in people is largely a good decision for law firms.” **LPM**

# A good starting point



Document automation is a good place to start your law firm's optimisation journey, says Kaden Smith of NetDocuments

With limited time in the day and more and more work piling up, law firms of all sizes, corporate legal teams, and government agencies are looking for better ways to maximise their efforts. Their answer? Automation.

While it's true that automation can help you streamline workflows, saving time and money, it can be intimidating to take the first step in adopting this new technology when you need to maintain your current day-to-day operations and workload.

And with so many different types of automation technology on the market, developing a clear understanding of what automation could actually look like for your legal practice or agency can be difficult. Where should you start?

Because so much of legal work begins and ends with documents, the best way to immediately benefit from workflow automation is through legal document automation.

By automating your document processes, you'll not only receive significant benefits with the least amount of disruption to your current operations, but also create a solid foundation for bigger workflow automation upgrades in the future.

## HOW TO OPTIMISE OPERATIONS WITH DOCUMENT AUTOMATION

Here are some specific examples of how document automation can help law firms of all sizes, corporate legal teams, and the public sector to optimise their operations:

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# Your MSP's ideal USP



A good managed service provider has knowledge of what your firm needs to thrive, says Nick Hayne, head of professional services at Quiss.

There will be any number of factors you consider when selecting the best managed service provider for your law firm to work with, such as their size, financial stability, the experience of the team, technical knowledge, awards won and industry partnerships, to name but a few. But as this is a relationship critical to the digital transformation of your business, not just the ability to keep the data flowing, the importance of a service provider's sector expertise should not be underestimated. And no, cost per user per month is not the most important factor.

When selecting the service providers to pitch to you, first consider the number of clients they have in your sector. How well do their engineers and the service desk team understand the technologies your firm works with every day, beyond the typical Microsoft applications?

Those firms new to your sector may talk about innovation and bringing new thinking to the issues you face, but now is not the time for a voyage of discovery on your time. You need service engineers that have solved issues unique to law firms a thousand times before.

The experience and knowledge to support you must be evident at every level within the service provider's offering.

You need to ensure there is not only surface knowledge of your technology, but a well-rounded understanding of your business and the issues most likely to impact your operations.

Here at Quiss for example, our work with law firms of varying sizes ensures the industry and application knowledge of our line one service desk engineers is equivalent to line two engineers of those managed service providers that do not specialise in the legal sector. The fact that we deal on a day-to-day basis with legal practice management helps us offer solutions at touchpoints. **LPM**

**Read more about hallmarks of a good managed service provider on the LPM website**

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# Environmental psychology

A law firm's office environment has a bearing on performance and client experience, says Rhicha Kapila, partner and chief operating officer at Bolt Burdon Kemp

Environmental psychology recognises the importance of the relationship between a person and their external world, and over the years this study has been applied more closely to how workplaces are designed. For example, it's been recognised that an overwhelming environment – one that feels too small, too noisy or overcrowded can increase feelings of stress. This is where big windows, high ceilings, square rooms (rather than rectangles), and partitions to break up very large spaces can be employed with great success in office spaces.

And it's not just about reducing feelings of stress and physical discomfort, but also recognising that a physical space impacts how an individual works and thinks. Colour, lighting, temperature and furniture can all have an effect. An element of the natural world and greenery can also really help reduce stress and some research even shows that design that incorporates more curved lines is also beneficial. A survey from Capital One found that 82% of office workers

believe companies need an innovative office space to encourage creativity and innovation. We've certainly seen the look and feel of a law firm office evolve over time, but is enough being done to consider how these interior design choices impact not just lawyers' psychology, but also that of their clients?



“It's not just about reducing feelings of stress and physical discomfort, but also recognising that a physical space impacts how an individual works and thinks.”

**RHICHA KAPILA, PARTNER AND CHIEF OPERATING OFFICER, BOLT BURDON KEMP**

Since the pandemic, law firms are having to reconsider more than ever what their offices look like. The vast majority of firms are switching to a hybrid working model, with some lawyers based



at home for a proportion of their week. So, what does this mean for the office and its function? Writing in the Harvard Business Review, academics Anne-Laure Fayard, John Weeks, and Mahwesh Khan believe that in the new normal, the office “will become primarily a culture space, providing workers with a social anchor, facilitating connections, enabling learning, and fostering unscripted, innovative collaboration.”

We're certainly seeing this and there's no doubt that the role of the office in an organisation has shifted. My firm has recently relocated and when we were designing our new office space, we made sure to think carefully about creating a space that encourages collaboration and innovation and instils a sense of calm and, when needed, fun. Although lawyers still value working from home, we wanted to create a space that welcomes lawyers

back and gives many a break from their home offices or kitchen tables and a chance to enjoy in-person collaboration with colleagues again.

The pandemic drove people to adapt how they work after such a long period of enforced working from home and office spaces need to reflect this shift too – adapting to the things that people enjoyed about working from home and maximising the elements that are unavailable to home workers.

For example, we thought about what people enjoyed about working from home – such as more soft furnishings and a greater variety of places to work. [LPM](#)

**Continue reading about what your law firm's office communicates to people on the LPM website**

# History of automation



Legal sector automation has evolved dramatically over the decades, highlights Jo Hunter of Access Legal

Due to the complex nature of delivering legal services and the plight of 'information overload' the sector is renowned for enduring, it is no surprise that lawyers have been looking for ways to automate law firms for many decades.

Looking back really helps to put law firm automation into perspective, especially when we see how far the profession has come in less than 100 years.

It is particularly insightful to see how automation has accelerated in the last 20 years, as it helps law firms recognise where they are on their digital journey and informs decisions in terms of where they should be heading next.

All of the tech developments listed below have contributed to, and enabled, the advancement of the case management and workflow automation tools that exist for law firms today.

**1950, dictaphones:** In the 1950s lawyers were starting to invest in dictaphones, revolutionary at the time, so that they could record their thoughts, instructions, and correspondence when convenient, on the go, for typing up later by their secretaries.

**1973, case-law search:** In 1973 the big red UBIQ terminal was the first thing that looked like a desktop computer, and lawyers at larger firms were able to use it to search for case law instead of spending hours poring over books in the law libraries. A legal profession automation that was ahead of its time.

**1978, word-processing:** Next, we had the Wang word processor in 1978, a special purpose computer that sat on many law firm desks providing proprietary word processing software. It automated document creation and production beyond recognition, enabling law firm case management to take a sizeable leap forward. **LPM**

Read more about the history of automation in the legal sector on the LPM website

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# Ready for bionic lawyers?



With futuristic predictions about the legal sector making the rounds, Jack Shepherd of iManage advocates a balanced approach to progress

There was an article in The Times recently about lawyers being implanted with bionic chips (yes, really). A report commissioned by the Law Society of England and Wales – titled 'Neurotechnology, Law and the Legal Profession' – suggested that brain implants might keep those billable hours in check by switching to a 'billable units of attention' enforced by an implanted bionic chip.

No more wiggling your mouse to appear online for another few minutes, then.

I hate to be a killjoy, especially when mind-control via neuro-implantation is on the cards, but I'm pretty sure that most lawyers are still using word processing tools to manage multi-million dollar cross-border transactions? We might be a bit far off from being plugged into the Matrix.

There is so much we need to fix in how law is practiced – doing things like jumping to bionic chips often has the effect of alienating the people that are actually practising law.

They think – "why are we talking about bionic chips if it still takes 5 minutes for my computer to start up in the morning?" And they have a point.

## THE TRUE VALUE OF LEGAL TECH IS MAKING LIFE EASIER

Artificial Lawyer may have hit the nail on the head with their judgement of the current status quo, "In large commercial law firms there is only one rule that really counts – stay busy." If progress is about working smarter not harder, then securing new tech is often an exercise in 'proving return on investment (ROI)'.

It is a typical ask of innovation teams in law firms to put metrics and numbers on the advantages of a new technology tool they are considering – such as "this will save one hour per day, multiplied by a certain number of associates equals a specific saving. **LPM**

Read more about the right approach to futuristic legal tech on the LPM website

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# Business on purpose

There's more to running a law firm than just profit – Joanna Kingston-Davies, chief operating officer at MAPD Group, presents some tips on how to give your firm a sense of purpose

I'm writing this in a coffee shop in Banff, sat next to my youngest child who wanted some time out from the hustle and bustle of town on his computer with his headphones on. The server was absolutely delighted – she said they aim both to serve great coffee and to be a safe haven for people. That's a great sense of purpose right there, and one we are truly appreciating right now.

I can almost count on one hand the number of times Brian Cullen, CEO of MAPD Group, and I, when asked why we do what we do as owners of the MAPD Group, have not been asked to clarify our exit strategy. It's the inevitable question to which so many people seem to want a black and white answer.

We've also, on many occasions, been met with extreme cynicism when we've said we don't have one. It seems to be a given, if you own a business, that you're looking to make money and then sell. Not that there's anything wrong with making money, but having a strong sense of purpose and being profitable are by no means mutually exclusive.

We're firm believers in Simon Sinek's infinite game. We're not in it to compete.

We're in it for the fun (and rollercoaster – I'd be lying if I told you that it was easy) of the journey and for the privilege to continue taking part. Of course we will exit at some point, but our ownership should be a mere chapter in the long life of a sustainable business.

There is no end game – just milestones along the way. That doesn't mean for a second that we haven't thought about how we might exit when the timing is right to hand the baton on to others for the next chapter – we just don't conduct ourselves or define our days with an exit point. We live for the little MAPD moments that are really, really special.

MAPD – Making A Positive Difference – is our sense of purpose. It applies to our clients (that goes without saying) but of equal importance is the way we MAPD to each other and to the communities within which we operate, whether they are geographical, virtual or sector-driven.

This includes our suppliers – we see our relationship with them as a partnership and not transactional. Everything we do has MAPD at the core, ranging from our decision-making at board level (have we passed the hand on heart test?) to the

monthly MAPD moments shared with and by our people – we share what we have done and how we have made a positive difference to our clients or to each other. Our big, hairy audacious goal is to have MAPD listed as a verb in the English dictionary – “this morning, I MAPD to my elderly neighbour by putting her bins out.”

I've worked in law firms in the past – really great law firms that ran like clockwork, were extremely profitable and full of great people – but this is hands down the best role I've ever had and I genuinely think that is largely due to the shared understanding of why we do what we do, the strong alignment of our tribe and the feeling of belonging to a collective sense of purpose.

We describe it as being on the rocket – we're all on a journey together, the rocket often changes direction because it's not aiming for an end point, so we're just enjoying the journey together and aiming for multiple different milestones along the way.

The top questions we asked ourselves in our journey to become increasingly purpose-driven were:



## 1. WHY DO WE DO WHAT WE DO?

We know what we do and how we do it, but why? Clearly articulate what you do as a business, how you do it and then ask yourself the searching questions around why you actually do it. What's it all for?

## 2. WHAT DO OUR PEOPLE WANT?

Just ask. There's no one size fits all and everyone's view is important so consider trying focus groups, discussion forums, questionnaires or pulse surveys. And just asking everyone the question!

## 3. WHAT DO OUR CLIENTS WANT?

Again, just ask – how often do we actually say to a new client, “talk me through what success looks like/what a positive outcome might be?”

#### 4. DOES THE CULTURE OF THE BUSINESS MATCH THIS SENSE OF PURPOSE?

This can obviously only be tested once you have clearly articulated the sense of purpose but it's easy to measure through regular pulse surveys once you have the sense of purpose embedded.

#### 5. HOW DO YOU WANT TO BE REMEMBERED?

This is a question that only you can answer. It could range from "as the best litigator in my field in the country" to "as someone who was compassionate and made people smile" or "as someone

who trained the next generation of good lawyers". There's no right or wrong answer.

#### 6. HOW DO YOU MEASURE YOUR SENSE OF PURPOSE?

Is it a KPI which carries equal importance to other more quantitative metrics? Look at what you currently measure, formally or informally. Is it limited to financial metrics such as billing, chargeable hours and recovery?

If you measure client satisfaction or people satisfaction, do you include them in the same reporting pack or are they separate? Do you give equal weighting to

each and what is the consequence of each of these metrics?

In other words, do people have the opportunity to get a bonus for good performance and is there any action for not meeting these metrics?

#### 7. IS IT SIMPLE?

The elevator pitch is the best test here. Can you articulate your sense of purpose to someone in a lift in under 30 seconds?

#### 8. IS IT AUTHENTIC?

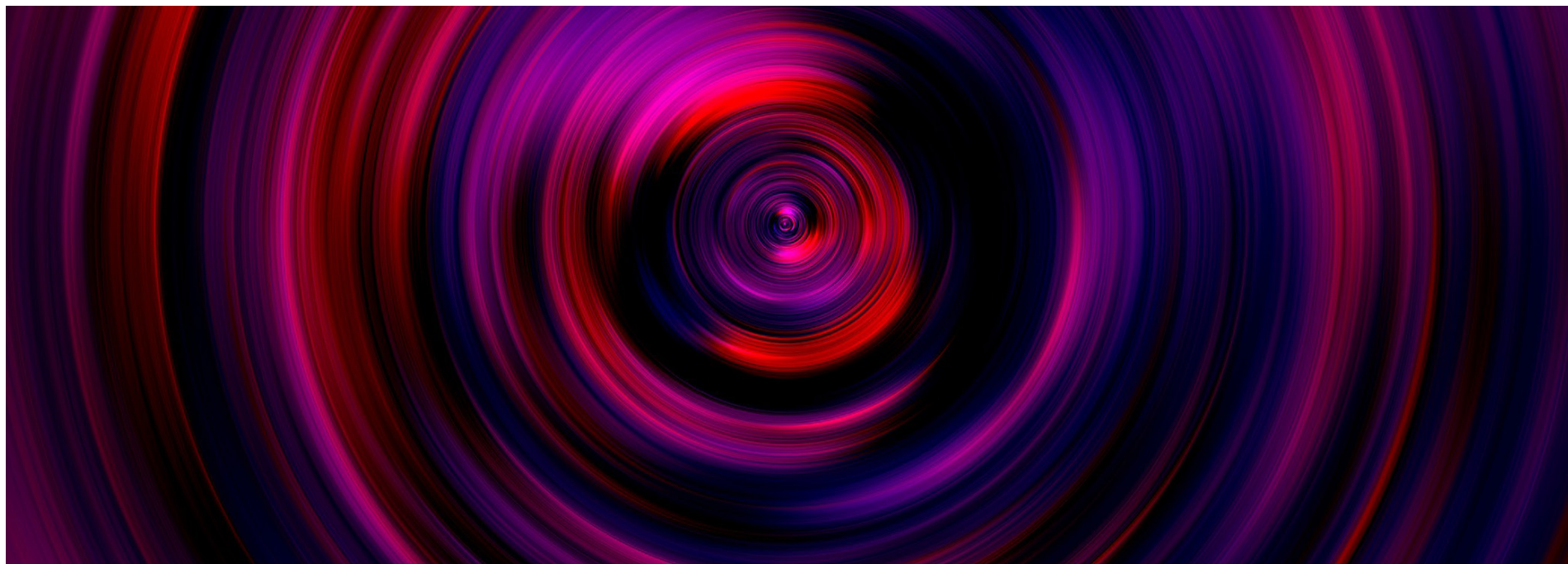
If people don't embrace it, it will feel fake and won't work. Ask your family and friends whether they think it works and what comments they have.

#### 9. IS IT FEASIBLE?

On the basis that true authenticity applies to our whole life, can we, and do we, live by it both inside and outside of work? As above – sense check it with your entourage outside of work and ask for their opinion.

#### 10. HOW DO WE EMBED OUR SENSE OF PURPOSE INTO ABSOLUTELY EVERYTHING WE DO?

From the way we recruit, to how we work with clients, to our approach to profit – this needs a team. Ask a group of your people to work this through and see what they come up with. **LPM**





# Futurising work

Actionstep provided the necessary tools for Hedges Law to make iterative changes to its case management system without significant additional costs

Hedges Law is a very modern 225-year-old firm that has embraced the benefits of cloud-based technology to enable lawyers and others to work flexibly from anywhere, while providing the best service and advice to their clients.

Here we hear about the experience implementing Actionstep, an end-to-end cloud-based legal practice management system via a fully virtual onboarding process during the Covid-19 lockdown. They discuss working with law firm consulting group Cloudify Legal, their technology challenges and goals and the criteria they used to choose Actionstep as their practice management software.

## WHAT INITIALLY ATTRACTED YOU TO ACTIONSTEP?

It's a true cloud solution. Our director of central services brought a wealth of experience of using SaaS (Software as a Service) in other businesses and sectors – we wanted to bring the latest technology to Hedges Law. Actionstep's workflow 'secret sauce' is what really sold it to us.

As we embark on an exciting journey of growth, the culture and background to Actionstep, combined with Cloudify Legal, really resonated with us and aligned with our values and culture.

## WHAT SYSTEM WERE YOU USING?

Hedges Law used a case management system that was hosted through an overly complex combination of a virtual private network, the software itself and Microsoft Exchange. Despite being promoted as a cloud system, it required a whole IT infrastructure that was costly to maintain, difficult to customise/update, and with so many moving parts, it resulted in reliability issues.

## WHAT CHALLENGES WERE YOU HAVING?

Reliability, the cost of system updates, the complexity of staff onboarding and poor reporting functionality were key challenges. Staff were growing frustrated with the time lost as a result of reliability issues, so it was a double-edged sword –

expensive in both wasted cash and time.

The system had customisation options but they required development just to make basic amendments. Each update would require a cost vs benefit analysis and due to the high cost, many of the features and things the system could have done never happened.

For new staff that joined we had to engage multiple businesses to set up licences, infrastructure, etc. This meant a long lead time between planning for a staff member to join and them being set up, and able to work. There was poor financial reporting out of the box. We spent significant time and money customising financial reporting to get meaningful data for us to make management decisions.

However, each time we added a new staff member or matter type, it required additional expense for the financial

reporting to be accurate. As we all know, a 99% accurate report is just as bad as a 50% accurate report. It needs to be 100% accurate. This meant we could not easily see the financial health of the business or report to all our stakeholders. **LPM**

**Read the full story of how Hedges Law modernised in partnership with Actionstep on the LPM website**

## ACTIONSTEP

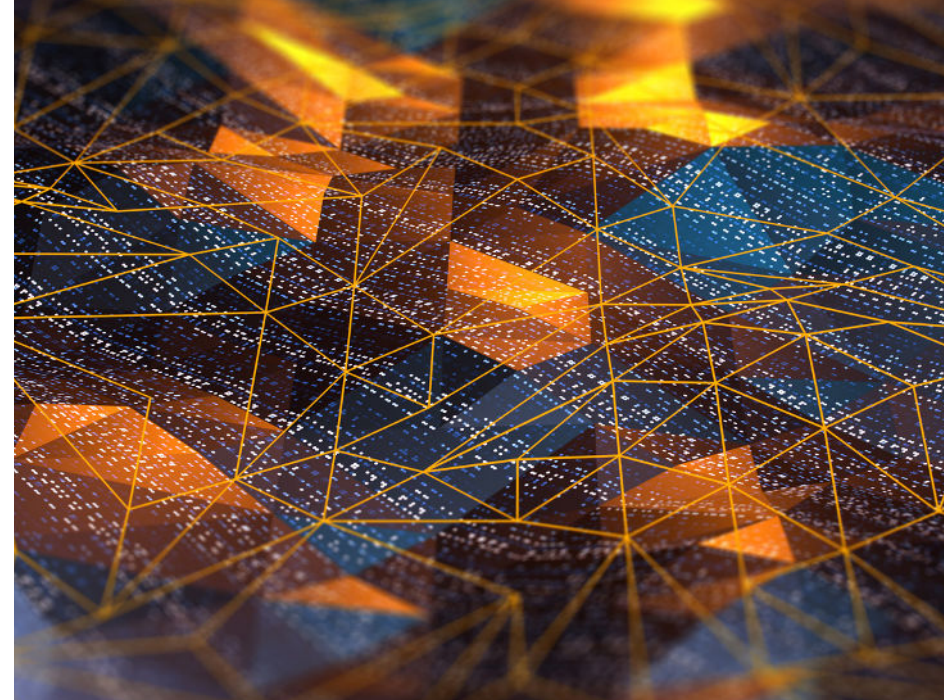
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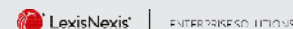
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