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Cloud strategies for law firms

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Foreword

Law firms have, to some degree, been adopting cloud-based technologies over the years as their business needs changed. They've migrated software, email and other key servers from on-premise to the cloud, and are now reaping the rewards of improved functionality, efficiency and user-experiences.

New solutions are removing barriers that once caused frustration to fee-earners, enabling them to work more effectively, while providing the flexibility to work from anywhere – which was critical during the pandemic.

Now the conversation has shifted. Firms are adopting cloud technologies at an ever-increasing pace, bringing their legal and office software together on virtual desktops with a single sign-on.

With an eye on the future, these ambitious firms are also looking at how their systems can talk to each other. They know that as valuable as analytics from their case and practice management systems are in their own right, it's important to look at the bigger picture – to layer insights with their other metrics, like time recording, financials and people management.

The pandemic has only strengthened their resolve to host more applications in the cloud. As well as enabling flexible and hybrid working long-term, firms see it as critical to attracting and retaining the talent that's in such short supply, and ensuring that their investment in fee-earners' salaries delivers value.

Where you are on your cloud journey normally depends on the in-house technical capabilities, as we'll see in this guide – written for IT teams and partners with IT responsibilities. Those with dedicated IT departments are pressing ahead with cloud migration, working closely with a provider yet configuring their systems in a way that gives them full control.

But even those with modest IT resources can make great leaps forward, leveraging increasingly accessible cloud technology and the expertise of their providers to unlock the benefits sooner.

Matt Newton
Oosha co-founder and Commercial Director at Access Legal

Talk to an expert

See further ahead and get in the fast lane

Doug Sawers, Managing Director at Access Legal, looks at how cloud technology can put law firms in the driving seat and get ahead.

Technology has opened up a world of opportunities for law firms to improve both their internal processes and client services. Software for case and practice management, document management and time recording have all helped to ease the admin burden on both fee-earners and office staff, enabling them to work more efficiently. Of course, the pandemic brought with it a wave of technological change, and unexpected benefits for employees and clients – video calls being an obvious one.

Many tools, such as marketing software, are now cloud-based as standard but firms have also been moving more of their office functions to the cloud, long before the pandemic. HR, accounting and recruitment software, along with case and practice management and document storage, are increasingly in the cloud, and unsurprisingly, firms plan to run even more of their applications there this year.

In fact, according to one survey, there's no area of the business that won't see investment in cloud services – in the form of SaaS (software as a service), IaaS (infrastructure-as-a-service) and PaaS (platform-as-a-service).[1]

Around 85% of UK firms used on-premise practice management software before the pandemic, yet this is expected to drop to 55% this year. On-premise email is also set to drop from three-quarters before Covid to less than 10% in 2022. The same survey revealed that fewer than 10% of firms plan to use on-premise video and collaboration tools, compared to 45% before the pandemic, which will enable them to implement hybrid working and online client meetings more successfully.[2]

Every company has seen, particularly over the past two years, that technology is crucial for efficiency, client experience, attracting staff and clients, and just ticking over day-to-day. They've realised the changes they've made are what they should have been doing anyway – in some cases, they've undertaken 20 years of IT development in just two or three years.

1 Source: www.legaltechnology.com/2021/12/13/exclusive-where-is-the-legal-sector-heading-with-cloud-debunking-the-hype
2 Source: Ibid

Talk to an expert

The biggest driver for change is the availability of transformative technology. You don't have to choose a single point provider anymore, even if those providers are very good at what they do. Instead of watching a 'beauty parade' of presentations by vendors, offering solutions that never quite integrate seamlessly, you can access always-developing applications from one central online place.

Different businesses have different data mining needs, so whereas some might only have moderate requirements others want to drill down further and look at their data from 200 points-of-view.

"Moving to the cloud is like turning onto a motorway after you've been driving on quiet country lanes or back streets – you can move faster, change lanes and look ahead to the future."

Forward-thinking law firms are making efficiencies and gaining more billable hours, as well as developing clear and robust processes for risk management. Given the high value of assets (i.e. people) within the firm, and the fact that once their time is lost it can't be retrieved later, the opportunity to enhance efficiency and performance is enormous.

" Imagine if you always had the data visible and accessible of your potential clients – you can select the ones you want to win and give that work to fee earners who are most expert and who can work most efficiently to achieve the highest margins."

Salaries are rising above traditional levels, but cloud technology makes it easier to manage and augment all aspects of the employee experience, ensuring that talented people stay with the firm, continue to develop and achieve a healthy work-life balance. From an onboarding perspective, it's easy to set up virtual machines and licenses so people can start working, from anywhere, on their first day rather than waiting around and feeling bored.

For fee-earners, ease-of-use and time-savings are among the biggest benefits – technology should make people smile not grimace. It's about giving them the same experiences at work that they have at home, which improves retention, wellbeing, productivity and commercial performance.

" Moving to the cloud ensures your software improves and becomes more capable all the time. It's updated with new functionalities, it can be scaled and the user experience gets better. Ultimately, if you don't get onto the motorway, you're going to get left behind."

Summary and next steps

- The pandemic has been a tipping point for investment in cloud services.
- Cloud migration is like moving onto the motorway after you've been driving on country lanes and back streets – you see further ahead and can move into the fast lane.
- Cloud-based software can be developed faster, improving functionality and user-experiences, which positively impacts employees' working lives and business performance.

What to consider

Step back from the day-to-day and think about what is holding your firm back. Could your fee-earners, and the business, achieve their goals if they had more time, insight and flexibility? Don't be afraid to be visionary, and leverage the solutions that are now accessible to smaller firms of all sizes through the cloud, so you can accelerate your journey to digital transformation. Look beyond case and practice management systems and think about how you can integrate your software to deliver deeper and more valuable insights that fee-earners can act upon to deliver better outcomes for clients and the firm.

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Talk to an expert

From IT support to cloud migration

Like many law firms, Lee Bolton Monier Williams LLP (LBMW) had reached the point where legacy IT systems and paper-based processes were taking up too much time and becoming a barrier.

With the IT manager taking a step back into a training role, the team decided this was the ideal time to review their technology provision – and took the decision to move to a managed services provider (MSP). They already outsourced IT support to a digital services specialist for the legal sector, so it made sense to build on this partnership as they embarked on their cloud migration project.

The timing couldn't have been better. As Covid-19 struck, and staff were forced to work from home, LBMW worked with their provider to implement remote working in just three days via a Digital Workspace solution.

Cloud migration took place over a weekend, driven by three objectives – security for sensitive data, achieving a paper-free working environment and enabling long-term remote working. The Digital Workspace supports all of this, since all of LBMW's data and software is now stored securely in the cloud, and can be securely accessed by employees through multi-factor authentication on a number of devices.

One of the biggest benefits of cloud migration is that law firms see improved user experiences and greater flexibility almost straight away with little or no disruption.

Through their digital workspace, LBMW employees can access their key legal applications, including their case management system, in one place, and work securely from home or the office. By moving to a MSP that works closely with the legal sector, they're also able to access support and network management and continually improve user-experiences.

Read more here

Talk to an expert

Cloud hosting: From enablement to optimisation

Matt Newton, Oosha co-founder and Commercial Director at Access Legal, looks at why more law firms are stepping up their cloud journey.

Every sector, and business, is at a different stage in its digital transformation, or cloud journey. Some, such as retail and banking, have had no choice but to adapt as large tech companies disrupted the market. Others, like law, have been moving their IT operations incrementally into the cloud for a number of years now, unlocking the benefits it can bring.

Of course, there are still tech laggards in law today but the pandemic brought about a major shift in mindset and tech adoption.

Enabling remote working might have been a key driver at first but more firms now see how it can help them achieve wider business objectives with improved flexibility, scalability and security. They want to create seamless, collaborative and mobile experiences for fee-earners in order to grow margins and improve commercial performance, now and in the future.

Firms have identified the changes they need to make to improve client experiences too, knowing they'll be benchmarked against consumer brands.

Like employees, they expect good usability, data security, transparency and for transactions to be fast and convenient. Few people want to walk into a solicitors' office with their passport and other documents when they're buying a house, they want to do everything online.

We've come a long way from the first iterations of the cloud. Not only has the functionality improved, it's also become more accessible to smaller and mid-sized law firms. We are moving quickly from simply hosting legacy software in the cloud, to web native apps that users install straight from the app store on their mobile.

Optimising the technology to meet the needs of employees reduces the risk of workarounds too. They're not going to use their own devices or email, so you have better security, but they are also likely to be happier because they can work efficiently and productively.

Talk to an expert

While the headline **£150,000 starting salary** for newly-qualified lawyers might not be the norm, the fight for talent is fierce, and firms are likely to miss out on bright graduates if their technology isn't up to scratch. The pandemic-fuelled Great Resignation may also have left some nervous that they're about to lose their best employees. Everyone expects technology to work for them, particularly the younger generations.

Software has traditionally had a long buying cycle and it's natural that firms want to get ROI from their existing purchases before moving to web native applications. One solution is to bring that software together on a virtual, or cloud-based, desktop, so people can access it easily and securely from anywhere.

All the tools they need are available behind this single 'pane of glass' which helps to improve their experience. It's a stepping stone to digital transformation, and one that feels less risky than wholesale change, since they're optimising what they already have. It's a stepping stone to digital transformation.

"*Not every firm has a high level of IT expertise in-house, so some might rely on their cloud providers more than others. But as IT becomes more of a utility – as essential as gas and electricity – even bigger firms are outsourcing many aspects of their digital transformation projects, enabling them to focus on strategy.*"

Technology vastly improves employee and client experiences, and protects margins. In the early days of the pandemic, firms simply had to enable flexible working. Now it's about optimising it.

Summary and next steps

- Cloud-based technologies enabled firms to move to remote working during the pandemic but now they're realising the wider benefits, including security and scalability.

- Change doesn't have to be wholesale, especially for smaller firms – you can bring applications together in one virtual, or cloud-based, desktop and ensure existing software delivers ROI.

- Firms shouldn't be afraid to use the expertise of their cloud services provider to ensure a smooth transition.

What to consider

Digital transformation will feel like a huge leap into the unknown for many firms but change doesn't have to happen overnight. There are benefits to bringing software into the cloud incrementally, making it easily accessible to users wherever they're based. While firms with high IT capabilities may be confident in managing their cloud journey with minimal input from their provider, others will lean more heavily on them. There's no right or wrong approach – but it's certainly a good idea to choose a proven cloud provider with experience in the legal sector.

A firm's perspective: Cloud migration, your way

Talk to an expert

David Jackson is CTO at Stepien Lake, a London-based law firm specialising in commercial property. Here, he describes his company's recent cloud migration – and highlights the importance of moving at your own pace to solve the everyday challenges your fee-earners face.

The role of IT departments is not only to keep the lights on but to deliver value to users within a law firm, in much the same way as fee-earners do for their clients.

" Inefficiencies and downtime are costly to the firm, which is why many are looking to move their software to the cloud, keen to realise benefits such as increased flexibility, time-saving and security. The pandemic will have prompted some to start their cloud journey while for others, like ourselves, it confirmed that we were on the right track."

Clearly, firms that don't embrace technology will struggle to remain competitive today, but of course, each one has its own goals, priorities, budgets and technical capabilities. Ultimately, cloud migration should enable teams to work better and achieve their operational and business objectives, whatever they may be, so it's important to understand your own requirements first, and the actual vs perceived benefits.

In other words, you've got to run your own race.

Talk to an expert

The road to digital maturity

Like many firms, we've been outsourcing elements of our IT services over the years. Back in 2010, it was email archiving back-up and later, security. While these functions are essential, it didn't make sense for the IT team to manage them day-to-day.

We wanted to channel our resources and expertise into projects and strategies that deliver value – after all, nobody is going to thank us for fixing an email server, they just expect everything to work!

We started running applications in the cloud a few years ago. It was mainly our back-end IT functions at first, the things that we knew were going to work well, for example migrating our onsite email exchange servers to Microsoft 365, rather than anything users interface with.

As was the case for any smaller firm, moving everything to the cloud would have been prohibitively expensive until recently and we had to consider the impact of migration on the user experience. Our system worked well for staff – it was always operational and we didn't want to compromise that.

We decided to move to the cloud once the technology had reached a level of maturity, and wouldn't be a risk to our business. There's a tipping point for every firm too. Ours was looking at the lifecycle of our IT kit and asking whether it'd be better to buy new servers or start our cloud journey.

The right decision

" After weighing up the pros and cons, and thoroughly researching the market, we realised that the cloud could help us improve user experiences and future proof our operations."

This was before the pandemic, and by the time we'd reached the implementation stage in November 2020, we knew we'd made the right decision. That said, we were under pressure to deliver something beneficial for staff. They had no complaints with the previous system but we knew it wasn't sustainable long-term.

"As a smaller firm, there is a little incentive for us to be an early adopter with our critical line of business IT infrastructure because it's a risk to the business. We've tried some of the big players, Microsoft Azure and AWS (Amazon Web Services) but their offer and roadmap changes quickly, and may not suit our future needs."

What we needed was a solid base, a cloud partner who had experience working with law firms, and who would allow us to retain autonomy over our systems.

Our fee-earners often have to react quickly to clients' requests but they can only be as responsive as their tools allow.

We couldn't afford for them to be waiting for 24 hours while they waited for a support desk to resolve an issue – we wanted our own IT team to be able to get under the bonnet and fix it as we've always done. It was also important to retain control of our data and for it to be stored in a highly-secure environment.

Go live day

Careful planning was key to a successful integration in November 2020. Our cloud provider even phoned up to say that they hadn't heard from us on the go live day but that was because it had all gone to plan!

In the lead up to our go live day we ran many tests and benchmarking exercises against our current systems. There was a group of test users checking for any issues and before the wider team logged on, we ran a Zoom session to guide them through the process and pre-empt any questions. Any change can feel disruptive to staff, but it's often the little niggles they talk about the most and which can cause them to lose faith in the project.

Talk to an expert

What to think about

It goes without saying that you have to do due diligence when choosing a provider and manage the implementation process carefully to meet and exceed users' expectations.

The more research on cloud migration you can do beforehand, the better. Before presenting your idea to the partners, be clear on your objectives.

It's up to IT departments, and people with IT responsibilities, to interrogate potential providers to ensure the technology meets the needs of users and the business. Have they got experience in the legal sector, and do they know how law firms operate and their nuances?

Then there are the questions you and your team have to answer. Are you looking to reduce the number of physical servers you have, create seamless user experiences, support remote working, improve security (or more likely, all of the above)?

Consider the implications of doing nothing too – for example, moving to a secure cloud environment reassures insurers that data is fully backed-up and could help with PI renewals. There'd be no disruption to business either if a fire damaged our physical servers, and we don't need anyone on-site to maintain them.

Being able to reduce the amount of hardware they hold is also important for firms that are looking to scale up their business, down-size their offices, become fully-remote, or simply save valuable space. For us, it has de-risked part of our operations – during the pandemic, we've been able to work continuously without being tied to the office.

Fee-earners and other people in a law firm don't always think about what the IT team does day-to-day. Of course, we're busy behind the scenes, installing software updates and patches, fixing problems and ensuring everything is running smoothly. By working efficiently as a department, we're able to focus on new IT initiatives to enhance our service further.

Summary and next steps

- It's important to be clear on your objectives and ensure the tech you invest in helps you to achieve them.
- A good cloud partner will understand the needs and nuances of law firms.
- Remember to plan carefully to ensure a seamless 'go live' day.

What to consider

It's easy to fall into the trap of thinking you have to move to the cloud because that's what other firms are doing. While it's clear that those who don't embrace technology won't be competitive for long, think about how it'll help you achieve your own IT and business objectives with improved efficiency, security and user-experiences.

Look ahead to what could hold you back in the future. Like Stepien Lake, you might already deliver a good user-experience but consider how you could enhance it further and future-proof your operations by reducing the amount of hardware you have.

Hear Matt Newton in conversation with David Jackson and James Hood in this webinar from Oosha

Talk to an expert

Five cloud myths debunked

Any firms looking into switching to a cloud service will certainly encounter several myths along the way – many of which are false or very outdated. Here are five of the most common.

1. Moving to the cloud is no cheaper

This is a common assumption by all sorts of businesses. Many believe that, because their in-house system is physically there, is owned by them and is solely their responsibility to maintain, it must be less expensive to retain that system.

This viewpoint, though, is only correct if those systems never need upgrading, the components last forever and the licences never expire. Of course, we know that's not the case.

Moving to the cloud means firms don't face the cost of replacing an outdated in-house computing and storage system at every life cycle.

However, the decision to switch is far from a purely monetary one. The true purpose of a cloud system is to speed up the day-to-day tasks that employees do. By automating laborious transactional processes, employees can spend more of their time solving more complex issues.

It also means commercial decisions are also made much easier. By drawing on data collected across the firm and automatically processing it, senior managers have much more information about how the firm is performing, such as where value is being lost or added and under-served markets.

The business case for moving to the cloud should therefore allay concerns about the initial outlay.

Talk to an expert

2. Security is more at risk

In the earlier days of cloud-based business software, this was often brought up as a reason for businesses not wanting to switch over.

However, cloud systems can be updated constantly and automatically to combat threats, and continually evolve as they develop – rather than needing to be manually updated with patches.

Files stored on the cloud can be encrypted but the advantage of having a dedicated provider means that the system is constantly monitored and tracked for attempts to hack it, which is particularly useful when storing and dealing with very sensitive legal documents and processes.

On-site servers are only as secure as your door lock, whereas good cloud providers use highly-secure data centres (tier 3 or above) with credentials a single firm couldn't match. Only authorised and security cleared personnel are able to enter, and servers are kept in a temperature controlled environment, with electricity generators as back-up, to keep your systems online.

3. They're a 'one size fits all' system

There are software packages and cloud networks available that do use this approach – a generic system in which some features will apply and some won't.

This is why it's important to choose a cloud partner who understands the legal market, and specifically for the working patterns and types of tasks undertaken, and its regulatory requirements.

4. Cloud networks can be slower

Connecting remotely to in-house servers for users who are out of the office, particularly at peak times like on a Monday morning, can be a challenge. Slow speeds and poor connectivity make the simplest of tasks, like saving or retrieving a document, time-consuming and frustrating. Using a 'one size fits all' system can also exaggerate this.

But will the cloud be any better? They may even have used a cloud system already that had this delay, seemingly confirming their suspicions. However, if this sort of sluggishness occurs while using a cloud system, it's most probably because of incorrect setup.

Good cloud system providers will create IT solutions that address the specific needs and ambitions of various different firms, across a range of sectors. They will work with each business' IT department to tailor the network to each. This means that users can have their own dedicated resources delivered by the system, in order to perform at the highest level.

5. Cloud migration is complex and too great a hurdle

It's obviously crucial in the legal profession that, whenever migration to a cloud system does happen, it should be painless. Documents may need to be accessed at any time and the firm has to keep working.

As long as the service provider works with the IT team and discusses how the process should work, as well as talking to the management team about how the migration will take place and what people should do, the whole process can happen smoothly.

To minimise disruption, migrations often take place over a weekend. For a successful switch, preparation is essential and staff need to be informed and able to ask questions at every step.

Talk to an expert

The positive impact to user experiences

Lauren Colbeck, head of product at Access Legal, looks at how bringing software into the cloud can help firms to deliver a better experience to fee-earners – and their clients.

Cloud-based technology is now advancing at a rapid rate and there are clear opportunities in terms of scalability, compliance, efficiency and performance. We know that some firms want to get more hands-on, making changes to data that drive their analytics and creating their own reports. Others are looking for an out-of-the-box solution that delivers the insights they need to make improvements and stay competitive.

Fee-earners don't see any of this, of course, but they do see the benefits. How they interface with the technology is intensely personal, they know whether it makes them feel frustrated or productive, gain job satisfaction or stress.

Nobody wants to try and remember hundreds of passwords, nor manually update fee-earners' targets when they're on holiday because the HR and practice management systems don't talk to each other. We don't want to have different user-experiences with each of the tools we use, it should be seamless.

The question IT teams and senior partners need to ask is how can you take the friction away for users?

When people have multiple log-ins, it jars with their experience elsewhere. It's not just about integration but interoperability. Software should be intuitive, anticipate our needs and prompt the appropriate action. We see this with our mobile phones in our personal lives, it's as if they know what they want us to do and suggest the next steps.

Cloud-based software is continually evolving to meet users' needs. Providers like us can listen to our customers, understand their priorities and build them into the system much quicker, enhancing functionality and both user and client experiences. Our plan is to create flexible fee-earner KPI dashboards with more metrics, such as client feedback, to create a well-rounded view of what success looks like and a time recording app to make this process more seamless.
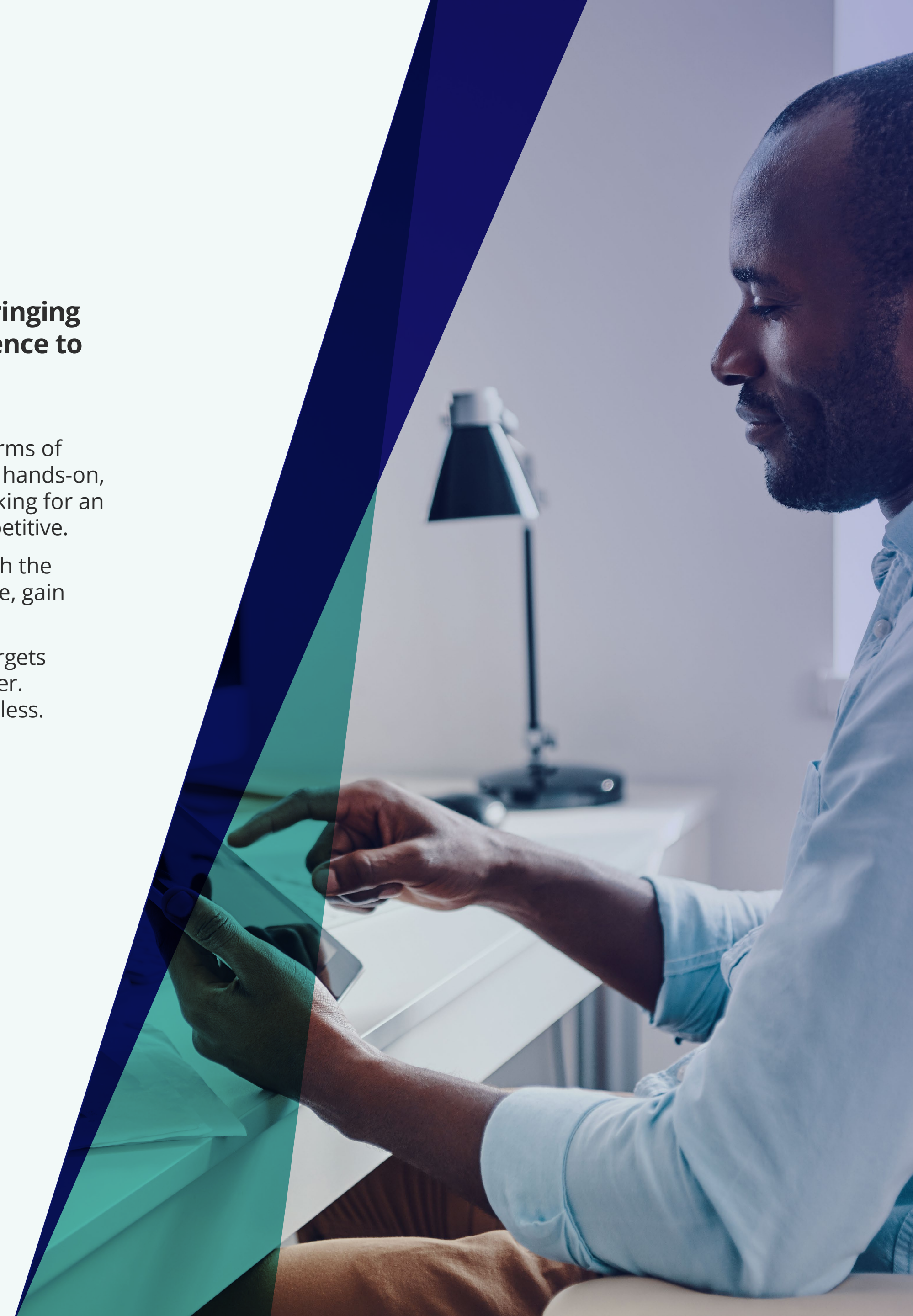
Talk to an expert

Legal work is complex but it doesn't mean the processes have to be cumbersome – in fact, technology should simplify them.

" With a central cloud-based platform, and single sign-on, firms can bring together everything in one place – it's like a front door to your daily work. This alone saves time and reduces frustration but it also offers information from across the firm, presented to the right people at the right time. When you're logging into different systems for case management, CRM, HR and so on, it's difficult to make effective decisions."

What makes this technology so powerful is that it enables everyone to work their own way, and caters to their preferences. They can view their emails, recent cases, targets, business insights and staff information on one dashboard to help determine their next action.

When you've got heavy caseloads, it's often hard to see the wood for the trees. You have the data but it's harder to act on it and you don't have time to crunch the numbers. This removes the complexity, allowing you to step out of the day-to-day, achieve clarity and be more strategic in your thinking. You can identify patterns and quickly understand the profitability of each case and fee-earner, and build on this.

Law firms adopting a hybrid working model need to equip their teams with tools that support collaboration, efficiency and data-driven decision-making, no matter where they're based. Anything you can do to facilitate remote and flexible working benefits people and the business.

Staff don't always want to come into the office, and clients don't always want to attend meetings in person. There are tools outside your digital ecosystem that enable collaboration, like video conferencing, but convenient access to case management systems and analytics makes it possible to connect the dots.

Summary and next steps

- Fee-earners don't know what goes on behind the scenes – how they interface with the technology is personal and it should enable them to work effectively.
- Just because legal work is complex doesn't mean processes and technology should be cumbersome. In fact, technology should simplify them.
- Data is powerful but we're now reaching a point where a system can also suggest next steps to speed up decision-making

What to consider

The question IT teams should ask fee-earners is, 'how can I take away the friction for them?' It's important to understand the pain point they face in a typical day – multiple applications (and passwords), limited or out-of-date analytics, problems working from home, heavy caseloads and so on. Moving to the cloud allows firms to create a digital ecosystem, where people seamlessly interface with the technology. It makes their time at work easier and more enjoyable, and will be reflected in their client service.

Talk to an expert

# *A firm's perspective: Putting people at the centre of digital transformation*

**Sarah Blair is Director of IT at leading Scottish law firm Thorntons Law and leads on operational and strategic IT, as well as digital transformation. Passionate about service design, she's been awarded the Progressional Development Award in Service Design by the pioneering Service Design Academy in Dundee.
Here, she shares her tips for a successful digital transformation journey.**

Digital transformation has been at the core of our IT and business strategies for a number of years - but technology and data are the enablers of change but not in themselves the objective. Digital transformation is about culture and mindset too.

It goes without saying that a programme of change like this has to be carefully-managed to reduce the risks and ensure the technology delivers value. For many firms, digital transformation can be daunting, which is why it's important to think about it in stages. Start with the foundations before moving to the next level, carefully monitoring performance and making improvements at every step.

Level 1

Based on my experience of leading on change management projects at Thorntons, I represent this phased approach as a pyramid.
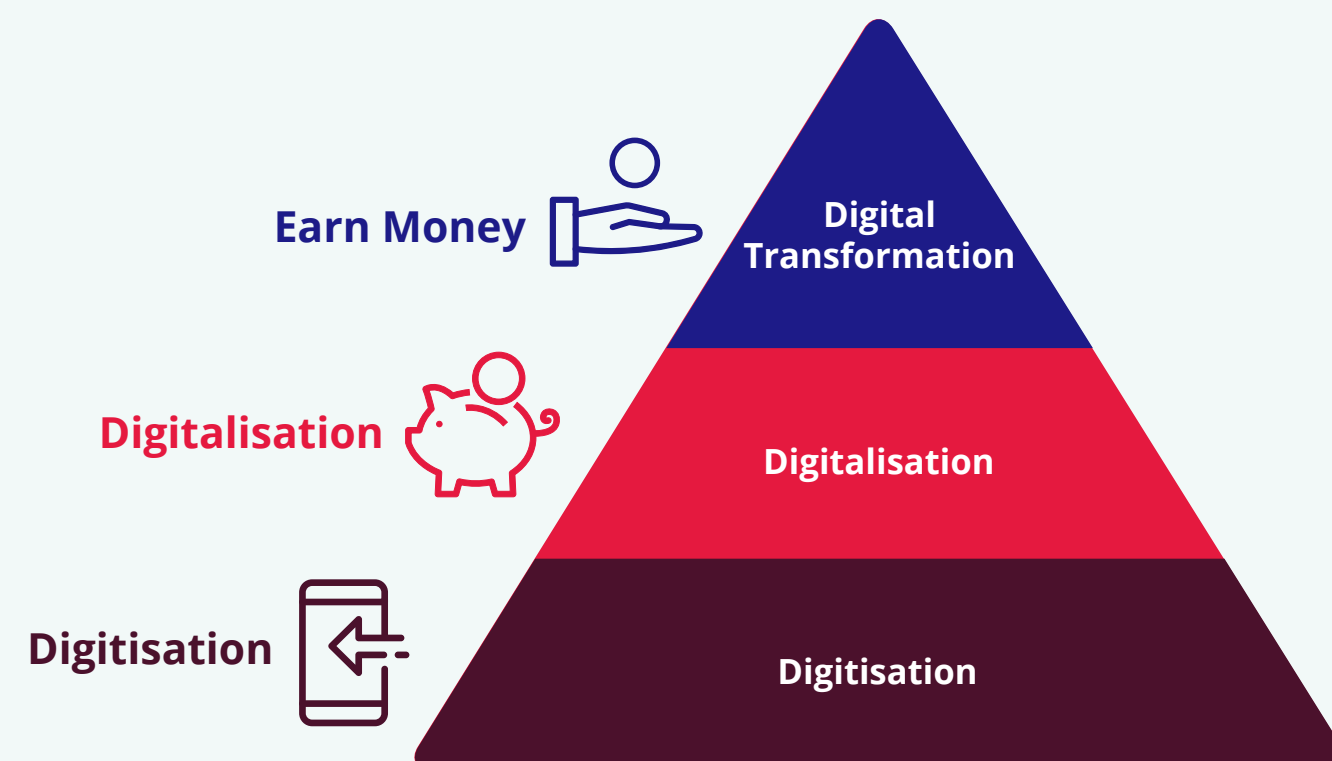
The bottom layer is the foundation of digitisation, a robust platform on which to build. It includes removing paper-based processes and introduces digitisation of processes like client onboarding, creating a digital mailroom for inbound and outbound mail and a 'File Free' approach – which is how we talk about paperlight at Thorntons.

During this phase, you need to develop strong and scalable infrastructure which supports agile working, and core parts like information security. You also need to ensure that core enterprise systems are fit for purpose and capturing key data – not just on financials but around clients and cases too, where you plan to introduce automation.

At Thorntons, we already had many of the foundations in place and were able to leverage the use of digital onboarding technology, digital mailroom and unified communications straightaway, and develop them further.

Like many firms, we have accelerated our move into the cloud with Office 365 services, making use of Teams and other core applications, but also allowing us to secure and manage endpoints more effectively through InTune and Autopilot.

We've migrated some workloads into the Microsoft Azure cloud platform too. We're continually striving to create fantastic user experiences, which support hybrid working.

Of course, there's still lots to do; much is still uncertain about how working practices will change and the technology is continually evolving, so we're having to adapt quickly, try new things and see what is working.

We're focusing much of our time and thoughts to 'offices and working life' at the moment, to enable a purpose-based return to the office and how the use of technology and smarter working spaces can support that. For example we're using 'Smart Gallery' multi-stream room technology now, to close the gap in meeting equity for those attending in different ways.

Talk to an expert

Level two

When these foundations are in place, you can look at the next layer of the pyramid by using technology to really drive efficiency around automation and integrations. You have to engage more deeply with the business to understand where technology can add value, mapping out the people and the processes and identifying pain points and areas of manual effort.

It's useful to create an integrated 'toolkit' of capabilities that you can dip into as and when use cases present themselves. Technology is a solution looking for a problem, so you need to understand the processes and the problems faced first and then find the right solution. If you have a trusted, integrated toolkit already, you can respond quickly with a solution, or you can collaborate with one of the many legal tech providers to implement a new solution, or develop something new or add integrations together.

Level three

The top of the pyramid is about true transformation – unlocking new business models through the use of technology. This part needs a real client-centred focus and deep engagement with the business. If you are using a toolkit of low-code tools you can really engage with the legal teams to quickly prototype possible approaches, keeping the client experience at the centre of things.

At the top of the pyramid, we've been analysing our client journeys and working out how we can introduce digital elements to create better experiences. We've also been identifying opportunities for new services or how we could deliver existing ones differently.

This is super exciting and most of this is around a change in culture, mindset and skills.

A key part of transformation is mapping out the current process and identifying opportunities for improvement. But if we do that only with the firm in mind, we just make our existing internal processes better without necessarily improving client experiences.

However, if we take a client-centred approach then we not only ensure we create a fabulous client experience too but we unlock new unsaid and unmet needs for our clients. Service design is a human centred approach which puts people at the heart of the process and creates products, services and experiences which they love.

Changes to IT is a big commitment, so it's really important that we're able to articulate the 'why?' of any project clearly. It needs to be closely aligned with strategy and we find having a sponsor for any major project who fundamentally understands the why and supports it is very important.

Although we look at the ROI of projects, I love the 'NABC' method for early assessment of a business case. Identify a clear **need**, describe the **approach** and consider the **benefits** and **costs**, as well as what the **competition** is doing. While a strong business case is very important as ideas develop, using the NABC framework helps you see that you are onto a winner early on.

Adoption is really important and can be a major risk to a tech project. We all risk having shelfware if we don't support the roll-out, which is why we constantly revisit a project to ensure adoption and apply continuous improvements.

Summary and next steps

- Digital transformation can be daunting, it's important to deliver one stage of the project before moving onto the next and monitor the impact of change.

- Technology is evolving constantly, so firms need to move quickly and be bold in trying new things and review, see what's working and what isn't and adapt.

- Remember that service design is a human-centred approach which puts people at the heart of the process and creates products, services and experiences they love.

What to consider

Use the pyramid approach to critically assess where you are on your cloud journey. Consider what you have in place and already, and what it'll take to move to the next level and eventually achieve digital transformation. As Sarah says, change in IT is a big commitment, so keeping the 'why' at the forefront of your mind will help you to get buy-in from the team and ensure the project delivers value – and never lose sight of the human element.

Talk to an expert

Conclusion

Cloud adoption and acceleration can feel both exciting and daunting in equal measure. However, it's now non-negotiable for firms that want to deliver excellent employee and client experiences, and grow. Old and cumbersome technologies will hold them back – and they'll also be limited if their systems don't connect, even if they're cloud-based.

Moving to the cloud, as Doug Sawers explained, is an opportunity to look ahead and move forwards, rather than getting stuck on side streets and country lanes. The technology is continually evolving to meet your needs, without time-consuming manual updates or workarounds.

Improved workflows mean that compliance and training don't need to be a barrier to fee-earners and can instead be built into their day, reducing admin and stress. Cloud technology should be an enabler not a barrier, and many of the myths surrounding it are unfounded.

As we've seen from Stepien Lake's experience, moving to the cloud doesn't have to be disruptive if you prepare well and anticipate any issues. An experienced cloud provider will guide you through the process step-by-step, offering the level of support required. Migration can take place over a weekend, so systems are up-and-running from day one, which means minimal disruption but maximum gains for fee-earners.

Matt Newton says that firms can achieve ROI on their existing software by moving it to the cloud before embarking on full digital transformation – a less risky strategy and one that's usually easier to achieve buy-in for.

While some legal practices will be pushing forward with their cloud strategy at full throttle, others are laying the groundwork and starting to join their systems incrementally. Wherever you are now, take a step back and consider how technology will enable you to achieve your goals according to your time frame. Like any investment, cloud migration and integration should deliver value and future-proof your business, so you can move forward with confidence.

Start your journey

Find our more about Oosha's cloud offering