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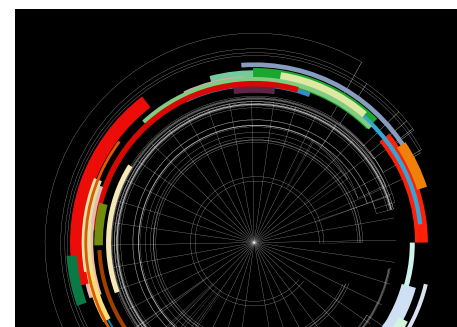✉ **info@practiceevolve.com**

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All systems are a go – choosing and optimising back-office technology was cited as the organisational challenge of greatest concern by 43% of respondents to LPM Frontiers 2022. For one, firms want to realise a return on their tech investments. Of equal concern is that core tech such as practice management systems (PMSs) are key cogs in firms' financial planning mechanisms, so a lack of optimisation could have damaging consequences – particularly at pressing times like these.

In the feature for this LPM special, we explore how reliant firms are on their systems to navigate economic instability, and what more they need from the tech ecosystem to survive and thrive. There's plenty of guidance to be had, though there is scope for potentially devastating error if data is not joined up. Read up on how to keep your bearings in low visibility.

We also hear from suppliers and subject matter experts – I interviewed Adam Bullion of **PracticeEvolve** to discuss how firms and tech providers can work together to make the most of business systems; Paul Longhurst of **3Kites** gives his take on where the PMS market is headed; Chris Pucci of **Osprey Approach** offers tips to maximise value from tech strategies; and Nicola Moore-Miller of **Jayva Global** stresses the importance of having the right support and a healthy approach to implementation when choosing business systems.

A lot to unpack and digest, so enjoy, and I'd love to hear your thoughts and questions. And stay tuned for more end-of-year content coming up on LPM channels!

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WHAT'S INSIDE?

About us

Aftab Bose is LPM's editor. He takes care of all content SME legal-specifc. He enjoys a good open mic night, too.
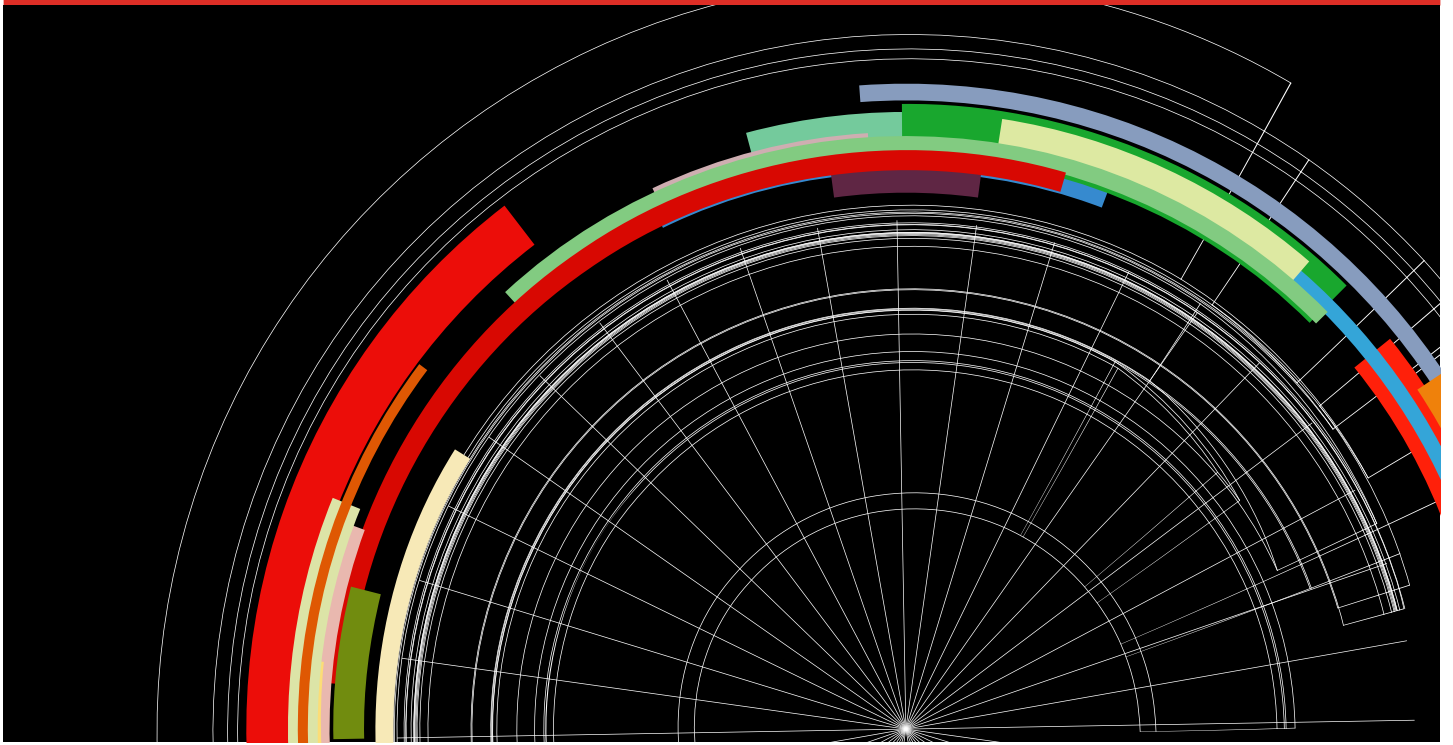**aftabb@lpmmag.co.uk**

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Firm bearings

How much can SME law firms rely on their practice management systems to help steer them through turbulent times? LPM's editor, Aftab Bose, speaks to tech and strategy leaders from the sector to understand their financial planning and technology needs

There's no shortage of barriers to accurate financial planning and forecasting for SME law firms currently, as they grapple with economic uncertainty and rising cost pressures. Coping mechanisms will vary – some firms might revert to tried and tested scenario planning, while others might use pressure as a catalyst for change and innovation. Whatever the approach, a reliable picture of financial health is imperative for survival.

Sean Stuttaford, chief operations officer at Thompson Smith and Puxon, explains: "The margin for error is small at times like this. A modest inaccuracy in income forecasts, for instance, could cause a very significant swing in cashflow for a typical firm of our size. For many businesses with ending fixed energy contracts,

those bills alone might be increasing by a factor of up to 10 in the next year. So it's vital for business leaders to have a clear idea of how much cash is actually going to be available at any given moment."

"There is a worry for firms in the market that don't have the people or technology to monitor and predict their finances closely – the situation is fluid and decisions need to be revisited frequently based on changing data. Firms could get caught out by small income fluctuations, and economic uncertainty might affect the availability of loans and overdrafts, which means that a significant share of the market is facing quite immediate risks," he adds.

THE FULL PICTURE

For him, as is the case for many others, leveraging the data stored in the accounting, case and practice management system (PMS) is the best avenue to reliable forecasting. Wayne Lord, head of IT and business improvement at CFG Law says: "Given that we specialise in serious and catastrophic injuries, our case durations can often extend over long periods – three to five years not being uncommon. That's a long time for money to be locked up and forecasting has always been crucial for us as a result – we need to know the status of each case, whether things look probable, when we can realistically expect a settlement and/or whether we can request a client makes interim payments.

"The PMS is essential for this. Right from the moment a client comes to us, the lawyer will plan out a case meticulously – and our PMS design

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"There is a worry for firms in the market that don't have the people or technology to monitor and predict their finances closely – the situation is fluid and decisions need to be revisited frequently based on changing data."

Sean Stuttaford, chief operations officer, Thompson Smith and Puxon

drives the workflow based on our standard processes. We track each milestone for the case using Workboxes, which are essentially lists of tasks required to complete every stage – all built into the system. These are very much like an inbox for lawyers, which prompt next actions.

"The upshot of such granular workflows is that we have full visibility of how each case is progressing. We can then use analytics across cases to estimate average durations and cash expectations for any given period, which can be weighed against expected costs. It's not an exact science and there is work to be done, but our data is getting better over time, and so is our forecasting as a result," says Lord.

While the PMS at CFG Law provides intricate information that lends itself to financial planning, Lord confirms that the firm has bolted on other tools to glean accurate insights from this raw data. This is a widely adopted strategy – one born out of necessity as most available PMSs seem to fall short to some extent in the reporting space, he says.

Richard Hill, chief executive officer at Stepien Lake, says: "The PMS is suitable for storing information, file management and compliance, but when you look beyond these basic functionalities and start planning for the future – they simply don't have the functionality. We've been trying to stress-test our cashflow receipts, which entails scenario-planning for how much debt we may need or how much our overdraft would be if our fee intake falls below a certain level, but our PMS doesn't have the financial tools to accommodate these calculations. We've had to run these scenarios separately on Excel, which works just fine, but getting the necessary information out of the PMS can be quite cumbersome."

"What we need is a single dashboard that displays risk alerts, KPIs, financial management data for forecasting and other key working capital data. This would save us valuable time, and though some systems have dashboards built in, they're not very sophisticated – not for the SME market at least. Larger firms with higher spending power have plenty of options available," he adds.

Limited dashboarding capabilities can be frustrating for SME firms at best, misleading at worst. Sean Stuttaford has been on a journey of improving his PMS's reporting capabilities and he's had no dearth of challenges along the way.

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Richard Hill, chief executive officer, Stepien Lake
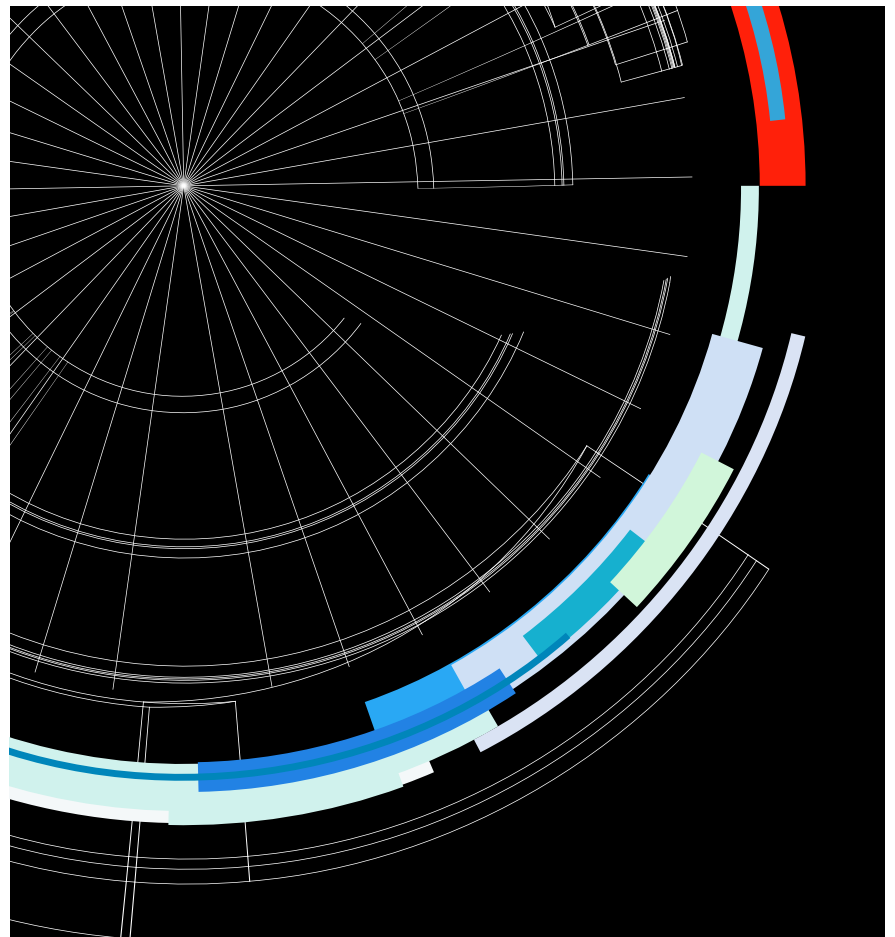
"Our objective is to give our lawyers all the information they require to make sure they capture time and have clarity on what work-in-progress (WIP) should be billed, interim, final and so on. The native reporting of our PMS falls short of providing this in a clear graphical way in one place," he says.

"Our system does have a dashboard – we can choose the available modules, but the formats are pre-determined and lack of customisation means the data can lack clarity. For instance, one of our reports displays total attended time in place of total chargeable time and appears to compare that with chargeable activity targets, which is like comparing apples with pears. The result being our WIP was thought to be significantly higher than it was in reality, and this confused team leaders who were using the dashboards, making performance management, understandably, very difficult," he adds.

PICK N' MIX
This could be devastating for small firms under current circumstances, and Stuttaford reports that he has since turned off the dashboards in some cases to avoid confusion. And since asking the PMS provider for options has come to no avail, like many in the SME legal market he has resorted to bolting on a range of solutions to make sure all reporting and analytical needs are met. It may be an additional cost for firms, but many see it as a necessary investment.

As explained by Hill: "Law firms manage their files differently and will use their systems in unique ways, which makes it challenging for providers – they will naturally prioritise developments that the majority, or the largest, of

their customers want. We've been working digitally for a long time, but it might take time for our way of working to filter through to a critical mass of SME law firms."

"This, combined with the fact most PMS providers have recently consolidated and are occupied with building roadmaps, means that any proposed development can take months or years to go live. Given how quickly circumstances change, we can't afford to wait that long, so we've added other solutions to the mix such as e-signing technology, client reporting tools and our own extranet, which can also be accessed through an app. The only challenge, and it's a significant one, is to make sure that all solutions are then joined up smoothly and compatible, though a number of PMS providers now offer APIs – which certainly helps with the integration process."

As such, building a bespoke system could actually work to a firm's advantage. "It can be more efficient to integrate external solutions because we can roll them out faster with in-house teams rather than relying on our PMS provider. The downside is that people are saddled with several logins, which can be a hindrance," says Hill.

Still, people are willing to log into multiple systems for the sake of efficiency – particularly as the ideal of having everything in a unified interface seems to be a distant reality. Richard Price, finance and IT manager at Maurice Turnor Gardner says: "There isn't a single PMS out there that does everything our firm needs. Larger providers will say they have a full suite of functionalities available if we buy their whole range of products, but that's still a matter of bolting on a mix of solutions – just within the same company."
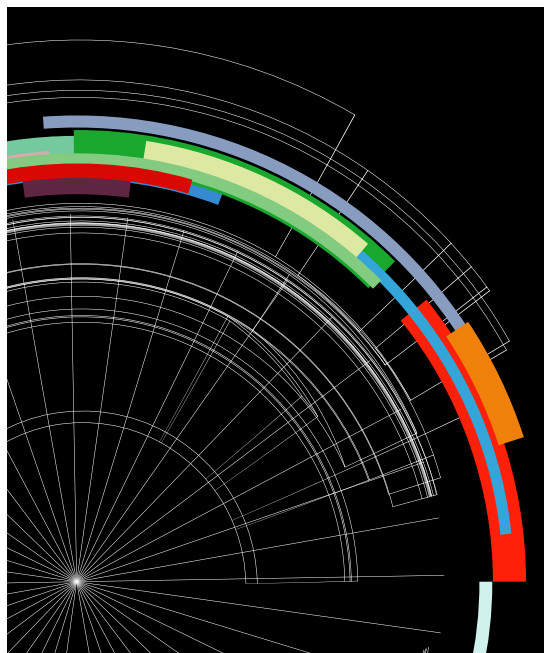
"As far as I know, there is not much cost benefit to signing up to the full suite of a single provider rather than picking a range of different solutions. The theoretical advantage is that all the products from a single company would integrate seamlessly with one another, but in my experience that's not always the case. An alternative provider could be offering a superior product that integrates even better. For us, it's always better to find the best-in-class solution and pay the right price for it," he adds.

The end goal is to have a fully joined-up tech stack – whether that comes from a single provider or by building a blend of solutions. Owen Kenny managing director Emily Allchurch reports that her firm is currently exploring options for new systems, and there is likely to be more than one solution in the mix. "We'd like to have dictation, emails, calendars, workflows and case management all integrated, in addition to data on billing, time recording and phone calls. I'd also like to see prompts, reminders and compliance checks incorporated," she says.

"This would be great from an auditing perspective, but it would also help to build transparency, which is crucial both for staff buy-in and a better client experience. The next step would be to add a layer of analytics over these systems to understand whether there are variations across practice areas in performance, pricing and profitability. There's a separate solution that we're looking at for those purposes."

Wayne Lord at CFG Law has implemented the very same analytics solution for his firm, and is satisfied with the results. "There is very little appetite among lawyers to sift through lines of data or spreadsheet extracts in the traditional sense, which most PMSs tend to produce off the shelf. Our data visualisation tool gives people snapshots of where they stand in the form of colourful charts and graphs. They can still drill down to the raw data if they need to, but the dashboard is enough to give them a realistic picture of their financial position, which is crucial at the moment."

The caveat to using dashboards, noted by many of those quoted above, is that the data entered into each system should be clean and accurate. While there's work to be done by PMS providers to make their systems more conducive to dashboarding, it's equally important for firms to train their people to input and interpret data accurately. Hill says: "Lawyers don't always see the value in data, or they don't have the capacity to make sure everything is entered in real time. The system can only produce insights as quickly as the data is entered, so training and integrating data capture into their daily work is crucial to ensure that we can keep a firm grip on our financial position."

NEW HORIZONS
A world of possibilities opens up once firms get their data joined up. One option widely explored is integration of the PMS with client relationship

management (CRM) tools – the latter emerged as the top tech investment priority among those surveyed in LPM's Frontiers 2022 research.

The integration can be leveraged to various degrees of sophistication. Richard Price reports that Maurice Turnor Gardner has had its PMS linked to a CRM system for a few years now – largely to consolidate its database. "It's far more convenient to manage all our contacts in one place. We have a client database, but we also have several contacts who wouldn't be included in it, such as at family offices and estate agents that refer work to us. So if we wanted to invite everyone to an event, for instance, we'd have to send out three separate email blasts. Having everything in one database makes things more efficient."

Others leverage this value for event management as well, with ambitions to put the integration to more advanced use. Stuttaford explains: "Our PMS has native a CRM function that ties into Outlook with an API. When communicating externally with any individual, a window appears at the bottom that gives them all the information they need on that person – their primary contact at the firm, their case history, their interests and any conflicts."

"The only challenge is that we've had to build the integration up from scratch in terms of taxonomy, as our providers seem to deliver blank templates rather than best practice. Our business development team has been crafting a taxonomy of referral and sub-referral categories that can add value for us and our clients – it's a significant time and capital investment, but it will be valuable once it's up and running," he adds.

With businesses under pressure, client relationships are more important than ever – and have been at risk due to the relative instability in the SME legal workforce recently. Richard Hill of Stepien Lake says: "Small businesses such as ours rely on very well-connected individuals who know their clients very well and have cultivated a relationship with them over time. But all that information is stored in their heads or on email – we'd like to formalise a way to track these connections and visualise our firmwide network when a business development or marketing opportunity arises."

"There are plenty of systems out there that can help and we're in the early stages of development. It's quite an extensive functionality to have sitting within the PMS, but of course it would be absolutely key if both systems could integrate," he adds.

MANAGING EXPECTATIONS
Firms can leverage their data to build a smarter, more resilient business in many ways. The question remains one of how much functionality they should expect, or even demand, from PMS

providers, and how much they should incorporate themselves.

Many have surrendered to the idea that consolidation in the PMS market, and providers' perhaps inadvertent neglect for the SME segment, will limit progress within a single system. One strategy has been to unify into user groups to build a stronger case for change with PMS providers, though even this approach is complicated by the time and effort taken to reach a consensus among users. And even where enough firms report a single issue, they say implementation of the change is too drawn out.

There are other limitations too – Wayne Lord of CFG Law came into the world of legal two years ago, having previously worked with a range of other case management systems in various business sectors (including finance and education). He says many of the legal PMS applications have been around for a long time and, as a result, the underlying architecture is outdated – making them complicated to modernise. "It could be years before we see fully cloud-native, web-based applications that meet our business needs," he says.

In the meantime, firms continue to take a proprietary approach to tech and integration, each building their own blend of tools and systems into a vessel they hope will help them to navigate some stormy seas – not just today but over future waves of change. **LPM**
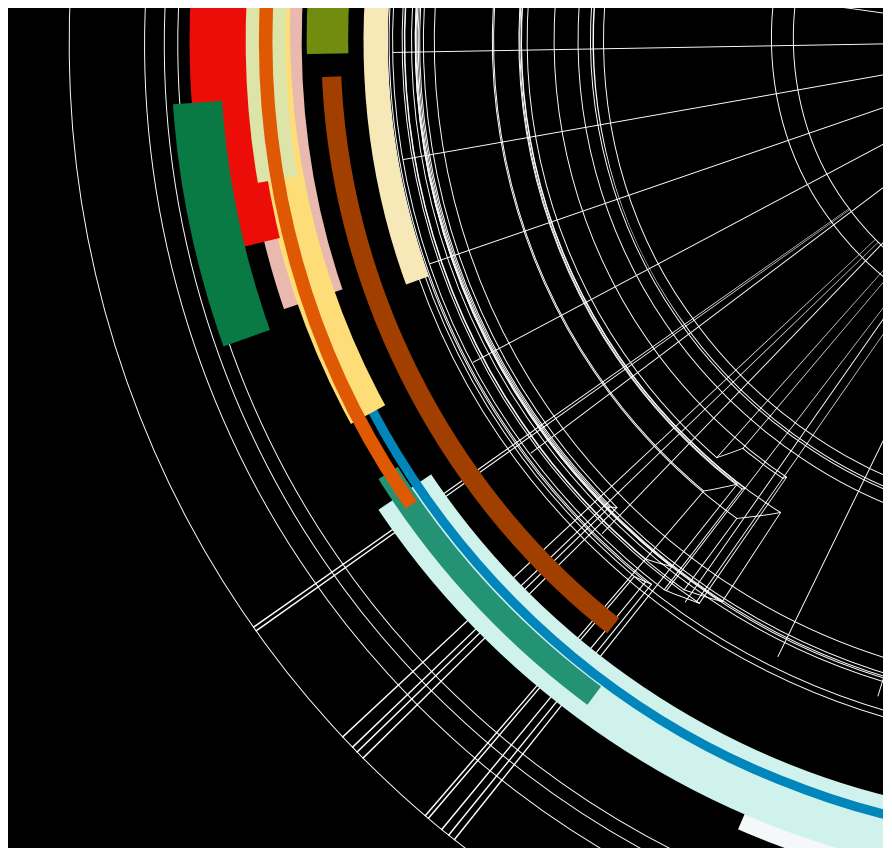
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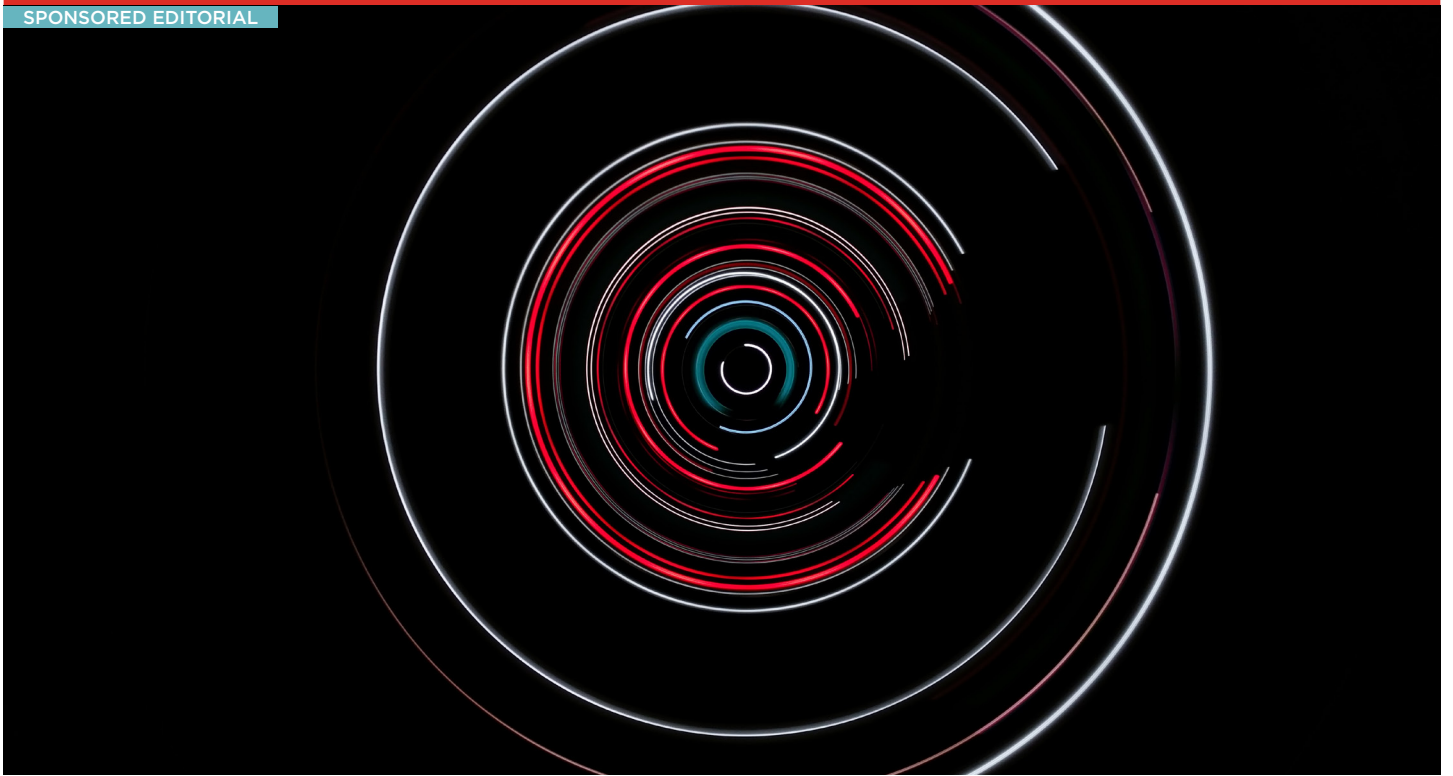**Kieran McGarrigle, McGarrigle Legal**

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SOFTWARE WITH A SERVICE

LPM's editor, Aftab Bose, speaks to PracticeEvolve's general manager of marketing, Adam Bullion, about the software provider's new approach to serving the SME legal market's evolving technology needs

At a time when SME law firms are expecting more from their technology, slow progress in the practice management system (PMS) space has been a common source of frustration. A good example is cloud technology – Legal Industry Outlook research conducted by PracticeEvolve in partnership with LPM recently revealed that 68% of firms in the UK are currently at some stage of moving their business systems to the cloud. "Still, in many cases, providers haven't taken responsibility to help firms understand the benefits of cloud – they need to invest in the resource and technology required to help clients innovate and progress their systems," says Adam Bullion, general manager of marketing, PracticeEvolve.

Consolidation among suppliers has been cited as one reason for the lack of responsiveness to law firm needs – SME firms need a significant amount of help to select, implement and optimise their systems, and suppliers in the process of consolidating don't necessarily have the capacity to offer granular support. As such, even firms that are kitted out with highly capable systems miss the expertise to make the most of them. In fact, the Legal Industry Outlook revealed that 74% of SME law firms in the UK utilise less than 50% of their PMS's full capabilities.

This is not for a lack of availability. "Our system is entirely open now – where firms would have to purchase different modules based on their needs in the past, every client now has access to the full suite of functions. That said, people might not be familiar with the various functions and how they fit in with their specific processes, so they will default to the way they've always performed certain tasks despite having a feature-rich system. The instinct is to choose the path of least resistance," says Bullion.

BREAKING DOWN BARRIERS

No doubt, a certain resistance to change – from individual fee earners up to the board level – does hold firms back. Using cloud as an example again – the research revealed that many firms recognise the benefits cloud has to offer such as a reduced need for onsite infrastructure, higher mobility for the workforce and more reliable data recovery, but a significant share still hold back due to concerns around complexity, cost of migration and security. According to Bullion, this tentativeness, combined with low utilisation rates and the fact that 78% of firms believe their users need to be more competent with the tools on offer, signals a clear need for a higher level of service.

For him, optimisation is a collaborative affair. "Providers and law firms need to work together

to identify where the gaps are in knowledge and usage, and then it's our responsibility to offer a service to improve users' knowledge of their systems. We've introduced client success consultants (CSCs) to guide and advise clients – new and existing – on how to get more from their technology," says Bullion.

"At the same time, we recognise that CSCs can't be there at all times for support, and law firms don't have the resource to train their staff weekly or monthly. So we've introduced the EvolveCommunity, which enables law firms to ask each other questions about performance, strategy and standardisation, among other key areas. We've also set up EvolveLearning – a series of bite-sized online videos that can be watched in no particular order, which helps clients be more exposed to the full functionality of their systems. And we run weekly training webinars on specific aspects of the software that clients are allowed to join for free, but which equate to a value of about £23,000 worth of training per firm each year."

"It's then up to law firms to encourage their people to participate in these forums and explore the resources – not only to boost utilisation rates but also to improve job satisfaction at a time when retaining talent is a particular challenge," he says. According to the research, more than 75% of firms link their ability to attract and retain talent with their employees' experience of their IT systems. "People want to feel like they're achieving something, and if they don't have the technology to help them meet their targets – they'll naturally start looking for alternatives."

STRIVING FOR SEAMLESS

Better knowledge of a particular system, while crucial, is not the only ingredient for a satisfying employee experience. Business systems also need to integrate with each other to avoid repetition and the need for multiple data entry, among a range of other functions. This is another area that law firms find particularly challenging – only 3% of respondents to the research indicated that their technology integrates seamlessly without any issues.

Many firms choose to build their own integrations, using their in-house IT teams to craft a bespoke, customised tech stack. "We provide an array of application programming interfaces (APIs) within a library that enables firms to create their own integrations. But that's a luxury of sorts for larger firms that have the

resource and time to build their own tech stack. The majority of SME law firms will require integrations that are in-built and ready to go, and it's our duty as a provider to offer best-in-class solutions for this market," says Bullion.

As such, this negates the opportunity for firms to choose their own tech stack, though he suggests that there is an upside to providers building integrations – namely seamlessness. "It would be a possibility for us as a provider to grab every solution available and integrate with it – leaving our clients to work out what is best for them. However, in today's world, with the number of options out there, that's simply not realistic. The fewer integrations that we focus on, the more seamless they can be because we're not having to maintain multiple solutions at once."

With this in mind, PracticeEvolve has built integrations with providers such as InfoTrack, DocuSign, iManage, Perfect Portal and more, which Bullion believes will positively impact both the employee experience and the client journey. "Taking conveyancing as an example, firms can now conduct all the administrative work of an onboarding journey – from pre- to post-completion – on a single platform. They can send out onboarding forms, conduct searches and make enquiries in a single interface, and all the systems speak to one another – so documents are immediately returned and filed, and any costs are recorded directly in the ledger."

"For people within the firm, this means they don't have to input too much data, and there is less scope for human error so no monies need to be written off. It also significantly cuts down administrative workloads and allows people to focus on doing what they enjoy – the law. And for clients, it means they can access all their documents in one place and can sign everything with an electronic signature rather than fill-in and post paper forms. Cutting admin time means everything happens faster for the client."

"Ultimately, it's about making sure the firm is as productive and profitable as possible," says Bullion. With best-in-class integrations, training and utilisation support, and a phased migration of several clients to cloud-hosted environments, Bullion believes PracticeEvolve is solving the most prevalent challenges firms face. The company is looking to progress from Software-as-a-Service (SaaS) to 'software with a service' – using a three-pronged focus on cloud, connectivity and competency to deliver real value for SME law firms. **LPM**

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THE BENEFIT OF HINDSIGHT

Paul Longhurst, director at 3Kites, draws on 16 years of experience in the practice management system market to analyse its current state and offer some strategic advice

3Kites consultants have collectively worked on more than 65 practice management system engagements from project managing some of the later Elite Enterprise implementations, through countless Aderant Expert and TR 3E selections and implementations, to evaluations involving Evergreen, SAP Fulcrum and others. We are now seeing a full-scale charge into the cloud with the market leaders taking different approaches as TR moves to a software-as-a-service (SaaS) platform whilst Aderant uses a hosted cloud environment.

Supplier consolidation in the SME segment of the market has seen some of the longer established names start to exit the market as companies including Access, Advanced and PracticeEvolve hoover up founder-owned products, whilst Peppermint has (successfully) shifted it focus away from the PMS. This consolidation created a gap which Aderant and TR looked to occupy, although the market wasn't necessarily ready to adopt solutions previously aimed at large law firms.

It was at this point that the latest generation of cloud-first systems started to truly replace their on-premise predecessors. Full-practice systems (which included PMS, case and document management such as Axxia, Partner4Windows and LawSoft) had traditionally sold well to small and medium-sized practices, especially where these needed to automate high-volume, low-margin worktypes such as debt collection, conveyancing and insurance claims defence.

These systems often had founder owners who had built the business from the ground up but, after many years at the helm and facing the cost of redeveloping for the cloud, decided to sell to larger players in the market. Filling this vacuum are products such as ActionStep, App4Legal, Leap and Tessaract while PracticeEvolve is building an all new cloud-based product that should reflect the best of both its previous on-premise system and its acquired LineTime and SOS platforms.

This is great news for small and mid-tier law firms which now have solid options to select from after a number of years where the list included too many on-prem-only PMSs that were unlikely to transition into the cloud.

From my perspective, there are still frustrations here. First, that HR functionality is rarely a component part of full-practice systems. For vendors servicing a people-based sector, it seems odd that HR is not included in the mix. This would provide a real soup-to-nuts solution within which data flows seamlessly. My second gripe is that document repositories are not provided as simple connectors for these systems – anyone authoring products in the legal sector must recognise the success of iManage, the rise of NetDocuments and the potential for smaller firms to use their Microsoft 365 licences for low cost document storage – though this is rarely acknowledged. Fixing these two points would help the next generation of PMSs to really take off. This is not to ignore customer relationship management which is an important component in the tech landscape for many law firms but, I suspect, a market that will see its own change over the next few years as established players are pushed to re-invent themselves.

And what of Aderant and TR in the rush to cloud? The big two are rightly embracing cloud, although the transition is not painless as true SaaS requires bravery in switching customers away from custom-anything to supported configuration only. Whilst these are challenges with a clear way forward, pricing is a real conundrum. The big two have been able to compete in the small to medium sector due to a dearth of good alternatives. However, with the arrival of so many new options that are cloud-based (and consequently future-ready), easy on the eye and relatively low cost (especially to implement), the big two will need to find a pricing model that allows them to compete in this market whilst avoiding alienating large law customers which can afford larger per person subscriptions but will also want scale to be recognised.

This is not a problem for the larger enterprise resource planning vendors which tend to operate only in the stratosphere with global firms headquartered in the UK and US. It might appear that the march of these vendors has stalled but I would expect them to push forward again as larger firms review their Aderant and TR platforms. As you might imagine, we at 3Kites think these are interesting times and I'm confident that our understanding of the market can help your firm to make the right choices here. **LPM**
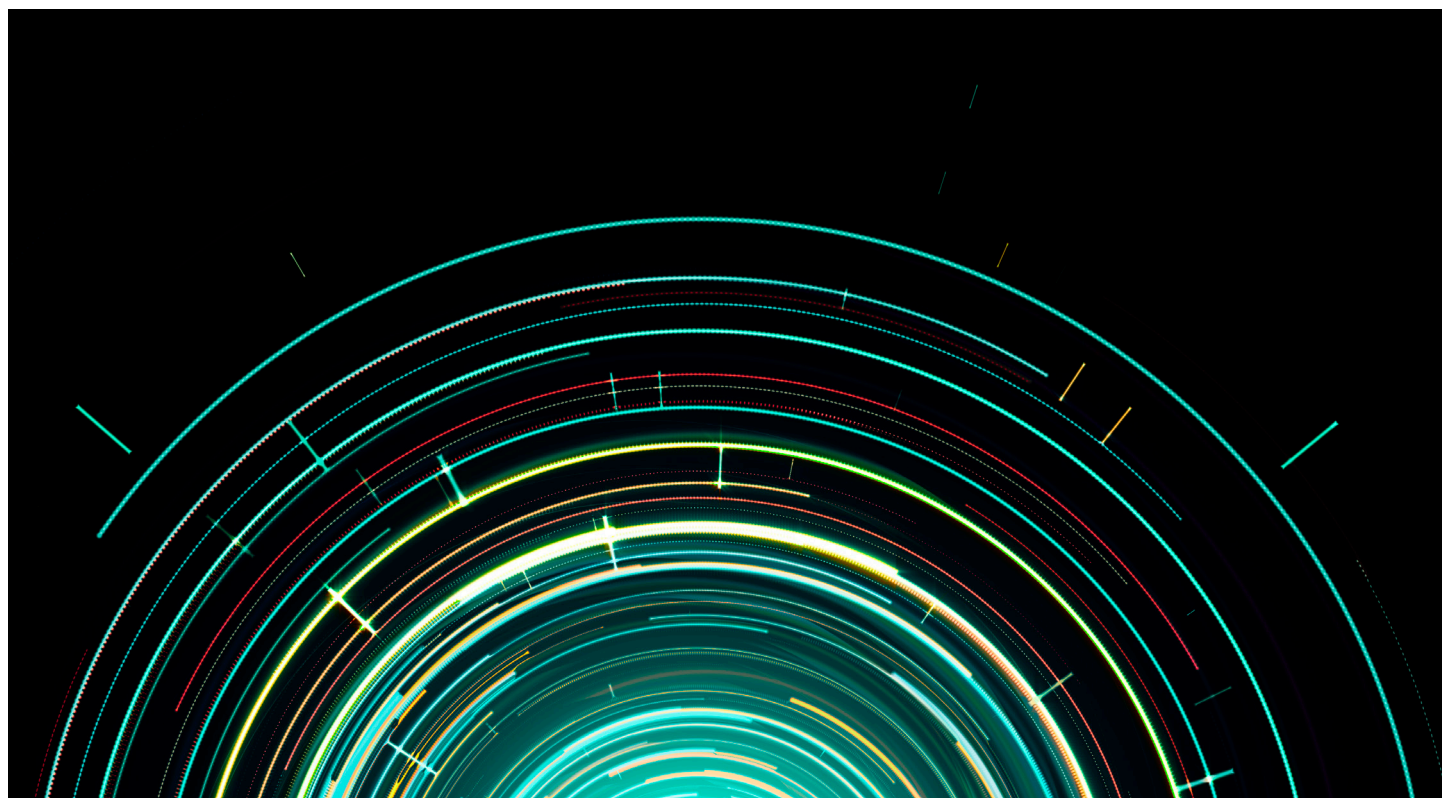
MAXIMISING VALUE

A coherent, strategic and people-centric approach is crucial to making the most of your firm's technology investments, says Chris Pucci, CEO, Osprey Approach

Have you recently questioned the value of your practice management software (PMS)? Or do you consider your PMS to be a costly overhead?

The growing pressures on SME law firms to operate in a cost-conscious way is increasing the expectations they have on their software investments – you're not alone in re-evaluating the return on investment (ROI) from your PMS. In fact, LPM's Frontiers 2022 report showed choosing or optimising back-office technology is the top organisational challenge for firms this year.

So, why is it that software investments – and in particular, PMS – aren't driving the value that's expected of them or that is necessary for firms to stay competitive?

ALIGN GOALS AND PRIORITIES

There are two key reasons why a PMS project doesn't succeed. Firstly, the project – or the software – isn't considered a priority. The second reason is failure to share the operational strategy and goals across the firm.

Humans are naturally averse to change, and you may be asking people within your firm to change decade-old habits. That said, clear communication of the firm's goals and plans helps to alleviate the fear and employees are more motivated to experiment. Having a clear digital operational strategy – that defines goals, aims, benefits for investing, timescales, and metrics for success – will outline what's expected of the team to ensure the investment will provide a return.

Without a clear strategy, technology investments aren't prioritised across the firm and other goals will always be put first. Pushing to increase billable hours for example, will then reduce any time for software training. Without training, employees work off the system and continue with ineffective habits. But, when no one is incentivised to utilise the software, they'll never prioritise its use – and the cycle continues.

INCREASE MEASURABLE VALUE

To make your PMS work harder, you need to increase the financial returns and value it provides to your firm. Before you can improve performance, you need to ensure metrics are

defined and tracked, so the results can be shared and communicated with stakeholders and employees.

Performance metrics are often focused solely on the operational efficiencies a system can provide – the increase in productivity and reduction in overhead costs. This is a great place to start but these metrics often experience quick growth at the beginning – the gains then level-out and become more difficult as time goes on.

Therefore, it's important to consider the additional value your legal software provides. Your firm should measure employee satisfaction, which – in turn – leads to a reduction in resource needed to hire more people; higher scalability in your current operation and your ability to increase your client base or case volume without needing to increase the team; the experience of your clients and the reviews, recommendations, and reputation you have because of the service you can provide; and, your ability to adapt to unforeseen challenges and ensure business continuity no matter the circumstance.

IMPLEMENT EFFECTIVE BUSINESS HABITS

To increase your ROI, you need to improve the utilisation of your PMS. Whether you're looking to implement a new solution or optimise your existing system, the key to increasing returns is maximising adoption. It's common to see a practice split in an 80:20 ratio of tech adopters and laggards. It's this divide in teams that slows down progress and hinders the most effective results.

To improve PMS utilisation in your firm you need to implement effective business habits. Habits that enable you to build a culture of innovation that has clients at the centre of your decisions and empowers your employees.

Your team's habits build the firm's brand and reputation. Even the smallest habits, when combined, have a great impact on overall performance. So even those 20% of individuals who don't utilise the software can greatly impact the expected returns and could be increasing the cost of the software if they're not maximising its capabilities.

Looking to improve the effectiveness of your small habits helps your team to master the fundamentals, which can help to sustain a continued increase in returns and value over time. Dave Brailsford's focus on marginal gains is a great example of this. By improving every small detail within the British Cycling team by just one percent, he was able to drive them to huge success.

IMPROVE UTILISATION TO MAXIMISE VALUE

To improve the utilisation of your firm's PMS, you need to start by documenting, then communicating, a clear operational strategy. Define what you want to achieve and why, the benefits to your clients and employees, and the objectives you'll need to meet to get there. This will help to get your wider team on board and assign responsibility to improve accountability. It's important that a member of management is ultimately accountable for the success of the strategy, but the entire practice is responsible for success.

Without a culture of innovation throughout the firm, change and experimentation won't be expected or prioritised. To embed continuous improvement into a culture, teams must focus on iteration rather than perfection. It avoids blame and turns 'failure' into valuable lessons. Having a supportive software partner can help to facilitate innovation in your firm and work with you to implement better processes and maximise the use of the PMS capabilities. **LPM**
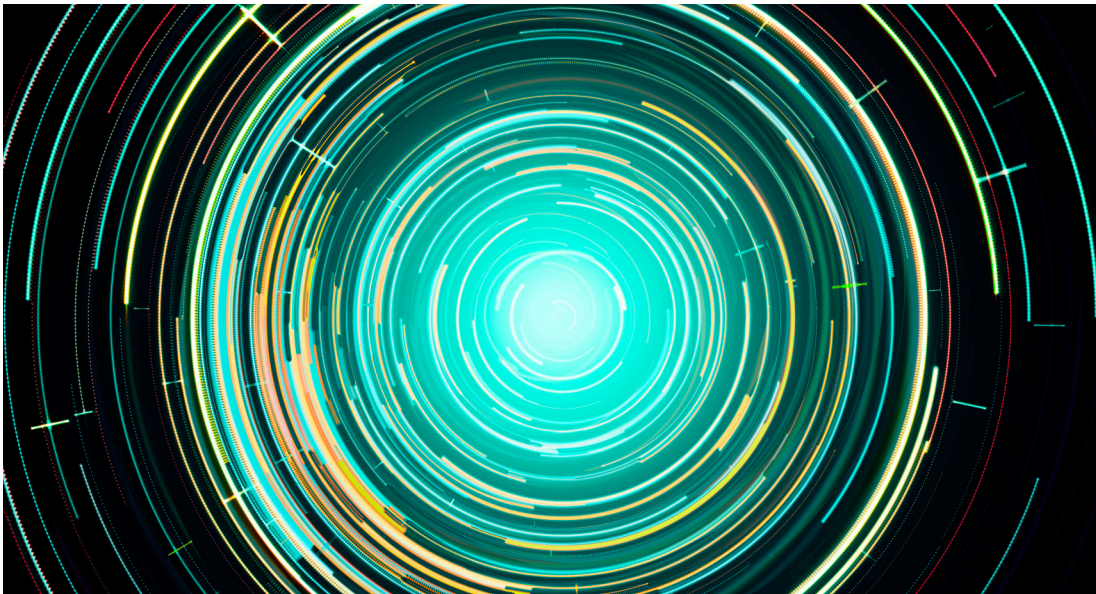
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THE RIGHT SELECTION

Choosing the right software shouldn't just involve examining what a system can offer, but also who is available for support and how the system is rolled out, says Nicola Moore-Miller, global chief executive officer, Jayva Global

Lots has changed in the legal sector. On the services side, with increasing volumes of new startups and de-mergers causing growth in the small law firm tier, these 'little fish in a big pond' are seizing the opportunities available to their agile businesses – unlike large counterparts bound by hierarchical decision making and legacy complex IT infrastructure.

On the software side, merger and acquisition activity amongst suppliers, and real uptake of cloud technology combine to impact system selection trends. Vendors that were relatively unheard of five years ago are gaining market share exponentially by offering innovative, cloud-based solutions with quick-and-easy Software-as-a-Service (SaaS) onboarding programmes.

Now, more than ever, there's no 'one size fits all' solution. Instead, practice and case management systems (PCMSs) need to offer core functionality along with flexibility for customisation and delivery, backed by an implementation and training option-led plan to cater for the varying needs of firms, operations and cultures.

THE VITAL NATURE OF BUY-IN

Often, it's a system's bells and whistles for better client experience, document management and matter automation that 'sell' PCMS solutions – not back-office tools.

When choosing new PCMSs, however, a critical success factor is buy-in from the law firm's administrative functions as well as fee earning teams. As the internal operations remit is so wide – spanning compliance, client onboarding, billing, accounts and reporting to name a few – the value of a motivated and well-oiled behind-the-scenes set up shouldn't be underestimated. It's what makes law firms a competitive force.

A recent Frontiers report from Legal Practice Management magazine identified three of the biggest operational challenges for SME practices as choosing and optimising back office technology for business efficiency; investing in client-facing technology and interfaces; and delivering models for more flexible working. New-entrant PCMS vendors are focused on offering targeted solutions which address these challenges head on.

TACKLING THE ISSUE

The five 'w's – 'who', 'what', 'where', 'when' and 'why' – are the cornerstone to every positive PCMS selection and implementation story. It's no longer only a tick-box exercise regarding system features.

SME law firms adopting new PCMSs can overcome the issue of buy-in and guarantee successful project delivery by having operational representatives on the selection panel from pre-sales onwards, and ensuring the vendor has specialist consultants with breadth and depth of knowledge across all functions to confidently answer technical questions. Engaging with experts who understand the demands and concerns of operational roles and fee earning teams alike provides reassurance and builds trust, both of which are critical to long-term success.

REMEMBERING THE BASICS

Legal PCMSs all broadly contain the same core functionality, albeit some are better on documents, others on accounts, others still on management information and so on, at the same time as complying with regulatory rules. Nowadays however, it's the 'who' and the 'how' which are the differentiators. **LPM**