

FEBRUARY 2023

LPM

LEGAL PRACTICE MANAGEMENT

Potential to nurture

Law firms have significant scope for growth if they harness the assets already in their possession

EMBEDDING VALUES

Making sure your firm's values are more than just words on paper

SEARCH FOR ENTERPRISE

Keeping a firm grip on vast reserves on knowledge

INTEGRATED PEACE OF MIND

Adding a layer of security over everything your firm does

Welcome

Realising potential is never easy – firms can find plenty of room for growth just by looking inward

People, knowledge and data are key ingredients for growth and resilience in any business. Law firms have these assets in abundance – the tricky part is leveraging their value to the fullest.

Doing so is a matter of embedding the right values in your workforce (p3) and embracing the value of technology (p4) – sometimes, knowledge boils down to the ease with which information can be accessed (p5) and the ability to use technology to find what is needed (p4). Of course, it's easier to strive for more if you have a safety net (p5).

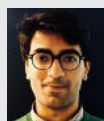
For a real world example of unlocking potential, turn to page six and read **ONP Group's** automation journey with the help of **LexisNexis Visualfiles** – the firm streamlined its conveyancing processes resulting in better outcomes for its people and clients alike.

Enjoy, and keep your eyes peeled for more LPM goodness this month – *Tiger Team* is back on 22 February, which will be closely followed by our risk special for this year. Get in touch if you want to get involved!

Aftab Bose, editor

@LPMmag | aftabb@lpmmag.co.uk

THE LPM TEAM



Aftab Bose
Editor

aftabb@lpmmag.co.uk



Emily Nash
Head of client services

emilyn@lpmmag.co.uk



Richard Brent
Head of content

richardb@lpmmag.co.uk

HOT TOPICS THIS MONTH

SPONSORED

>04

Changing up to speed

Jack Shepherd of **iManage** on how to find capacity to drive change among the workforce

>04

Software served right

Comparing home tech to office tech with Adam Bullion of **PracticeEvolve**

>05

Search for enterprise

Kaden Smith of **NetDocuments** on how to maximise your firm's knowledge assets

>05

Integrated peace of mind

Azure Virtual Desktop can take security management off your hands, says Nick Hayne of **Quiss**

CASE STUDIES

>06

Limitless potential

Andrew Taylor, CTO of **ONP Group**, outlines the firm's automation journey with **LexisNexis Visualfiles**

READ OUR FULL
PACKAGE OF INSIGHTS
ON OUR WEBSITE

READ OUR FULL
PACKAGE OF CASE
STUDIES ON OUR
WEBSITE

COMMENT

>03

Embedding values

A strategic approach is required to ensure that your firm's stated values are put into practice, says Ed Simpson of **The Legal Director**

020 3925 2769

LPM@lpmmag.co.uk

Burlington Media Group
20 Mortlake High Street
London, SW14 8JN

Issn 2398-9742

Embedding values

How many law firms really adhere to their stated values? Ed Simpson, director and CEO of The Legal Director, explores how this intention can be brought to reality

How many firms have got the support of their employees and convinced them to embrace the firm's values in their working lives? Playing lip service to defining a value system can really backfire. If you are undertaking this as a marketing opportunity – a chance to create some inspiring images or an impressive presentation – you risk damaging your reputation with your clients and engendering cynicism and distrust in your employees.

I have recently invested considerable time trying to define the culture of The Legal Director – to think about the values that I would like the business to be known for and to be embodied in its client legal directors. It's still a work in progress, but here's what I've learnt so far.

WHY DO IT?

Successfully defining your values brings clarity to your firm's identity. You know who you are and what is important to you. This is helpful. When your values underpin every process, you can guide your business with more focus, manage your

communications with more authenticity and recruit with more confidence.

Recruitment and retention are issues across all sectors. Getting the right people on board is vitally important and something we pay particular attention to at TLD. Our team is dispersed across the country and our lawyers work



Though you want everyone to buy-in to the business's values, this initiative is not about building consensus. It is about senior management creating their vision and communicating it to the firm.

ED SIMPSON, DIRECTOR AND CEO, THE LEGAL DIRECTOR

independently. Fostering a team identity and an affinity to the TLD brand would



not be possible without shared values.

DEFINING YOUR VALUES

There's a lot riding on getting it right – choosing the core values that really encapsulate the ethos of your firm. So, how do you make your values have real meaning?

1. Firstly, you need to think carefully about what is important to you. When you have conceptualised the values that matter to you, you need to explain how that translates practically. In the context of your firm, what behaviours embody those values? If you value enthusiasm, how can your team demonstrate that?
2. Don't choose values that should be self-evident. Being 'honest' and 'professional', or having 'integrity', is the bare minimum your clients can expect and not something you should

be shouting about.

3. Don't confuse aspiration for core values. Though it is important to set goals, those should be reflected in your mission statement. Choose values that are sacrosanct to your firm and relevant now.

WHO GETS A SAY?

Though you want everyone to buy-in to the business's values, this initiative is not about building consensus. It is about senior management creating their vision and communicating it to the firm. Provided the values you espouse are ethically and strategically sound, people will get behind them. [LPM](#)

Continue reading about embedding the right values in your business on the LPM website

Changing up to speed



Finding the capacity to keep your people in sync with change is a challenge, says Jack Shepherd, legal practice lead at iManage

So, your lawyers can't streamline their workflow until it's moved to a new system, but they can't make time for training on the new system because they're too busy delivering for clients. Sound familiar?

Keep it simple. Don't tell me you don't run a mile when you see a four-hour block of training added to your calendar, or a set of instructions in an email longer than most merger and acquisition contracts. Think about formats like bite-sized videos or target times when people are likely to have the headspace for learning.

When pushing for onboarding, I usually prefer to use a carrot rather than a stick, but sometimes it takes for something to be taken away for people to realise they have no choice but to learn how to use a new system.

What can really move the needle is leveraging your lawyers. People are more likely to listen to training from other lawyers (sorry IT department). In an article, Legatics CCO Daniel Porus suggests that you identify your champions and leverage early successes – celebrate those early wins to gain momentum and build greater awareness across the business with people who are

eager to be a part of the success.

TRAINING CHATGPT IN THE ART OF CONTRACTS

In a bid to save time, I've been putting ChatGPT through some more testing real-world scenarios. I put its language learning model to the test recently by throwing a few contract drafting scenarios its way. At first glance the results are superficially impressive, but then crumble under any meaningful scrutiny. Part of the problem is that the output of Chat GPT will vary wildly depending on how your input is phrased – for instance, asking the same question in a slightly different way. [LPM](#)

Continue reading about bringing people up to speed with change on the LPM website

IMANAGE

Leading-edge document management, data security and AI solutions

t 07498 202346

w www.imanage.com



Software served right



Adam Bullion, general manager of marketing at PracticeEvolve, compares home life and work life to illustrate the value of the right tech

As I write this article at home, it's just above freezing outside, making it quite uncomfortable to try to concentrate on writing at my desk on the top floor. You see, I much prefer being warmer and I think a home should always be warm. So I've just turned the heating on simply by asking Alexa to set the temperature. In years gone by, to do so would have meant heading down towards the thermostat to turn it up. For many, you may remember the need to firstly turn it on near the boiler and then turn the thermostat up. That would have resulted in using the opportunity to make a cup of tea and maybe just wipe down the worktop before slowly heading back upstairs.

As humans, we can be easily distracted, even if we have the best intentions. However, the fact I can ask for the heating to be turned on means I don't lose my train of thought. I don't have to leave my desk. I've suddenly become more efficient. I can rely on the technology to perform the function while I carry on writing. Nowadays, I probably take for granted the little savings in time the tech I have affords me.

Of course, this is only one small example of how technology offers time and efficiency savings. Although we

grow and adapt with new inventions, it is important to remember that technology is built and evolves over time. With this in mind then, ultimately, the same has to be true of the technology we use in the workplace as well.

It's why PracticeEvolve is focused on building software to increase productivity within law firms. Just like my heating, we connect software together to ensure everything communicates, significantly reducing the amount of administration required, including rekeying data. By avoiding the rekeying of data, not only is time saved but human error is reduced.

However, firms need more than just clever technology to really achieve greater productivity. [LPM](#)

Read more about the parallels between home tech and business tech on the LPM website

PRACTICEEVOLVE

Delivering a complete legal practice management system through powerful software with a service.

t 07507 971296

w www.practiceevolve.com



Search for enterprise



Your business has droves of valuable knowledge – Kaden Smith of NetDocuments says enterprise search can help capitalise on these assets

According to a recent report published by KMWorld, lawyers can spend up to 22% of their work hours searching documents scattered across dozens or more internal data sources. What if finding information across all the data sources in your organisation was as easy as doing a single Google search?

Welcome to the world of enterprise search. The term “enterprise search” refers to technology that brings an internet-like search experience to finding and retrieving relevant documentation, data, and knowledge that are stored in various formats across multiple databases within an organisation.

Enterprise search empowers your teams to benefit from the combined knowledge from across all internal data sources, presented in a more holistic view.

With enterprise search, content from all your information sources, such as documents and email stored in document management systems (DMS), websites, intranets, CRM tools, financial systems, and more, can be indexed and made easily searchable.

IMPORTANCE OF ENTERPRISE SEARCH

Knowledge is power. For knowledge workers who deal with significant amounts of documentation, such as law firms, large businesses, and public sector entities, enterprise search has become a valuable — and even mission-critical — tool for daily operations.

This is because it dramatically reduces the time it takes to retrieve all the most relevant records an individual intends (and has access) to find. Everything can be found in one place versus having to search in multiple locations. **LPM**

Read more about the convenience and value of enterprise search on the LPM website

NETDOCUMENTS

NetDocuments provides true cloud document and email management alongside agile collaboration tools

t 077474 51614

w www.netdocuments.com

netdocuments

Integrated peace of mind



Cybercrime never goes away – Nick Hayne, head of professional services at Quiss, says Azure Virtual Desktop can give firms peace of mind

Clients trust your firm with their most confidential information and it is valuable to criminals. While other issues have risen to the top of the agenda, the threat to law firms remains very real and as the biggest firms implement the latest security measures, mid-market firms become the target.

Few firms will ever publicise a successful ransomware attack, but various reports claim more than a quarter of law firms globally have experienced a form of data breach – the consequences of which could be immensely damaging financially and reputationally for any compromised firm.

There are a huge number of steps any firm can take to mitigate the risk – for starters, they can create and implement a data security policy that reflects the fact that major security issues often begin with simple user error, not a failure of technology.

The next most important step is to continuously warn everyone within the firm of the ongoing threat. Then train your people regularly to avoid accidental user errors and recognise the most common approaches from criminals, including phishing emails and fake webpages.

Never overlook the relatively simple

and highly effective step of encrypting all your data, whether at rest or in motion. And spend time helping your people understand the need for strong passwords and how to create them.

You should also consider access control, as not everyone within your firm needs access to all your data and where it is stored – enforce the principles of ‘least privilege’ and ‘need to know’.

Finally and perhaps most importantly, plan for the worst-case scenario. Create and test a plan that details what your firm will do following a data breach. It should list all the immediate action steps, such as internal communication. **LPM**

Read more about the security benefits of Azure Virtual Desktop on the LPM website

QUISS

Business support solutions for small to mid-tier law firms

t 077645 79674

w www.quiss.co.uk

Quiss
Excellence through experience

Limitless potential

ONP Group leveraged automation enabled by LexisNexis Visualfiles to “achieve the impossible” in conveyancing, says the former’s CTO, Andrew Taylor

ONP Group, based in Stockport in the North West of England comprises ONP Solicitors, Cavendish Legal Group and Conveyancing Alliance. With over 500 employees, ONP Group is one of the leading providers of legal services to the property and re-mortgage markets.

ONP Solicitors (ONP) has been a user of Visualfiles and its predecessor since 2002. Throughout this time, ONP has leveraged the case management system as the firm’s core innovation and process automation engine to drive business efficiency and deliver the best possible

client experience – an area that challenges many in the conveyancing legal sector.

Since upgrading to the latest version of Visualfiles this year, ONP has reduced the time to completion of conveyancing transactions by 30 days, and re-mortgaging cases by 10 days. Already, 60 per cent of the firm’s re-mortgaging processes are automated, and this figure will increase to 90 percent within the next 12 months.

Andrew Taylor, ONP Group’s CTO, states: “Conveyancing and re-mortgaging are complex processes, but with the right technology, it’s possible to streamline and simplify them, so that clients have a positive and even stress-free experience. Our investment in Visualfiles is driven by this objective.

The solution has evolved with our business requirements, allowing us to integrate our core business processes with current and client-preferred digital interfaces that make life simpler for all parties – our firm, introducers and customers.”

“The solution has evolved with our business requirements, allowing us to integrate our core business processes with current and client-preferred digital interfaces.”

ANDREW TAYLOR, CTO, ONP GROUP



VISUALFILES, THE CORE AUTOMATION ENGINE

ONP isn’t a traditional conveyancing firm. Ditching what it considers to be out-dated ways of working in this sector, the firm has adopted technology to automate and innovate.

This has enabled ONP to establish a low cost base, increase productivity of case managers – which in turn has allowed the firm to take on more transactions, while delivering a superior client experience to clients.

Leveraging the robotic process automation (RPA) capability offered by Visualfiles, ONP has automated workflows at the back-end, across the conveyancing and re-mortgaging lifecycle, significantly reducing or even eliminating human intervention for repetitive and administrative processes.

This is allowing case managers to

focus on the high-value aspects of the conveyancing process, and directly contribute to delivering the best possible experience to clients right across the customer journey. **LPM**

Read more about ONP Group’s automation journey on the LPM website

LEXISNEXIS ENTERPRISE SOLUTIONS

LexisNexis Enterprise Solutions, part of LexisNexis, is a supplier of legal productivity software solutions

t 0 133 226 2003

w www.lexisnexis-es.co.uk

LexisNexis | ENTERPRISE SOLUTIONS



Access Legal provides an unrivalled suite of solutions – helping firms take control of their time, improve efficiency and productivity.

www.theaccessgroup.com/legal



Bundledocs cloud-first ebundling, delivery and collaboration software helps legal professionals automate time consuming activities.

www.bundledocs.com



CTS is the only provider of cloud and managed IT services purely dedicated to the UK and Irish legal sectors.

www.cts.co.uk



Get more from your data with **iManage's** leading-edge document management, data security, and AI solutions.

www.imanage.com



Accessible through a single, sophisticated platform, **InfoTrack** is your solution for end-to-end digital conveyancing.

www.infotrack.co.uk



Legl is a modular, data-first platform that automates onboarding, compliance and payment processes, drives operational efficiencies and improves client experience.

www.legl.com



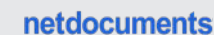
LexisNexis Enterprise Solutions, part of **LexisNexis**, is a supplier of legal productivity software solutions.

www.lexisnexis-es.co.uk



LexisNexis UK helps lawyers win cases, manage their work more efficiently, serve their clients better and grow their practices.

www.lexisnexis.co.uk



NetDocuments provides true cloud document and email management alongside collaboration tools made for agile working.

www.netdocuments.com



Osprey Approach is a powerful case management solution that drives long-term efficiencies to improve profitability.

www.ospreyapproach.com



PracticeEvolve delivers a complete legal practice management system through powerful software with a service.

www.practiceevolve.com



Quiss is a specialist managed service and cloud solutions provider in the UK legal marketplace.

www.quiss.co.uk



TM Group is a forward-thinking technology business using software and data to provide services for property professionals.

www.tmgroup.co.uk

BECOME AN LPM CHANNEL PARTNER



Emily Nash
Head of client services
emilyn@lpmmag.co.uk

CHECK OUT
OUR CHANNEL
PARTNERS

p7

GO TO
LPMAG.CO.UK

