

APRIL 2023

LPM

LEGAL PRACTICE MANAGEMENT

Productivity rush

**Are people, processes and technology
conflating to boost law firm productivity?**

THE HARD TRUTH ABOUT TECH

A system only has value if people in a firm
use it

ONBOARDING AT SPEED

A story of digital transformation and
boosting efficiency

THE FUTURE IS FLEXIBLE

A look at the four-day working week
and other new working models

Welcome

Productivity is not just about having the right tools and people – it requires a bit of innovative thinking

Boosting productivity is a complex task – raising morale, investing in the right tools and better allocating resources can all contribute in isolation, but these interventions are inevitably interlinked. SME law firms have been investing in people and technology for years, but it takes a substantial amount of project and change management to make sure these efforts conflate to make their businesses more productive, and ultimately more profitable.

In this issue, read about how much time law firms could be saving through automation (p3) and why they haven't quite managed to cut these inefficiencies (p6). People lie at the heart of productivity – would tech bring any value if it wasn't used properly? (p4) And are firms taking the right steps to attract more clients (p3), or focused enough on the manner of their service delivery to retain them? (p6)

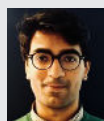
A range of experts address the productivity conundrum. Plus, we track real life transformation stories – of how **Legl** helped **Woodstock** cut down its onboarding times, and how **Moray Legal** is using **LexisNexis Visualfiles** to build a more tech-driven practice.

Enjoy, and do get in touch with any thoughts and questions.

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

>03

Productivity on record

Kaden Smith of **NetDocuments** on the vast automation potential in the SME legal sector

>04

The hard truth about tech

Tech has no value unless it's used, says Jack Shepherd of **iManage**, highlighting the value of user adoption

>04

Flexibility is the future

Adam Bullion of **PracticeEvolve** on tech, flexibility and the four-day work week

>06

Closing the gap

Episode two of LPM Tiger Team 2023, in partnership with **NetDocuments**, focused on challenges around automation

Issn 2398-9742

>06

Experience matters

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

CASE STUDIES

>05

Onboarding at speed

Legl enabled **Woodstock's** expanding team of consultants across the country to onboard clients quicker and more efficiently

>07

Road to innovation

Moray Legal is making strides on its digital transformation journey in partnership with **LexisNexis Visualfiles**

COMMENT

>03

Press play on marketing

Thought leadership videos are an effective way of attracting clients, says John Wallace of **Ridgemont**

020 3925 2769

LPM@lpmmag.co.uk

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

READ OUR FULL
PACKAGE OF INSIGHTS
ON OUR WEBSITE

READ OUR FULL
PACKAGE OF CASE
STUDIES ON OUR
WEBSITE

CHECK OUT
OUR CHANNEL
PARTNERS

p7

GO TO
LPMmag.CO.UK



Press play on marketing



Ridgemont's managing director, John Wallace, on the value of video-based content and thought leadership for attracting clients

HubSpot's 2022 report on the use of video in online marketing found that more than 80% of online traffic is video based and that number is increasing year on year. The time to start producing video is now.

Videos offer us the opportunity to provide clients and prospects with leveraged, valuable content, making us an authority on construction and real estate law. Our content enables us to take a prospect through the sales journey so that they understand our expertise, how we will charge, how our services will be provided and what is expected of them as a 'good client'. These videos act as a self-qualification system to ensure that those picking up the phone to us are much further down the sales process funnel than they would otherwise be.

And before you say "we already do videos," the vast majority of law firm produces videos that I have seen involve a 'grey lawyer', wearing a grey suit, sitting in a grey room, talking about a complex legal issue in a way that nobody can understand and nobody is going to be interested in. Those videos don't count. The key to successful video marketing in law is that the video must

be engaging, provide substantial and pragmatic value and look, sound and feel great. That is the winning recipe.

To produce great video content, legal businesses need to:

1. Identify a target demographic for their marketing efforts
2. Understand what issues or obstacles they are looking to overcome
3. Spend time staring out of the window thinking about how great video content can help that person
4. Produce a script in as natural a voice as possible, avoiding complexity, and providing pragmatic tips that viewers can implement now
5. Find a great location that will be an interesting backdrop to the video
6. Set up sound and lighting so the video looks and sounds great
7. Record the video numerous times to ensure there is sufficient 'reel'. **LPM**

Continue reading about the value of video marketing on the LPM website

Productivity on record



Lawyers spend nearly a quarter of their time doing tasks that could be automated, says Kaden Smith, director at NetDocuments

When choosing which technology to invest in, it's difficult to balance single-use point solutions that do one thing well with platforms that do many things. What is most critical to your productivity is selecting cloud-based technologies with strong integrations between the components of your ideal tech stack to support and enable complete workflows.

Cloud technology is the standard in modern law firms with 76% of firms either already in the cloud or choosing cloud-native solutions, because robust APIs that aren't locked behind on-premises doors expand their combined capabilities and streamline workflows.

Assembling documents, transferring data, pushing projects through reviews and approvals – these tasks, and more, can be streamlined or automated using integrated systems.

Three benefits of integrated cloud platforms:

1. More efficient workflows.

Law firms rely on numerous technologies on a daily basis. Manually transferring data and documents from one platform to the next can be a taxing process,

time-consuming and error-prone. Integrating tools so they can communicate seamlessly makes workflows more efficient, reducing manual work and the risk of embarrassing errors.

2. Less time spent on low-value tasks.

Lawyers are a firm's most valuable assets, so why waste their time and cognitive bandwidth on low-value tasks when it could be better spent on more meaningful work? It's estimated that 23% – nearly a quarter of their day – doesn't actually require their personal involvement and could be automated. **LPM**

Read more about the automation potential in SME law firms 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

The hard truth about tech



Tech solutions don't deliver any value unless they're used, says Jack Shepherd, legal practice lead at iManage

So much work goes into any product launch and subsequent user adoption that one fact is often overlooked – there is zero value realised before a tool is used.

As Peter Duffy of Legal Tech trends often reminds me on Twitter: "All the beautifully crafted user stories, wireframes, polished designs, and lines of code are a store of value." That value isn't realised until the product actually falls into the hands of customers. Any engineering work you do before that does not equate to any value. As with any testing, it's only when the actual end-users get value from it.

It's easy to fall into the trap of believing that all the initial hard work equals value delivered. But the truth is, the only way to truly evaluate the effectiveness of a process is by looking at how it's being followed by actual users. If it's not adding value, it's time to reevaluate. Unless, of course, it was a marketing play all along.

A lot of work goes into implementing tech and none of it makes any impact on a business. That's just the way it is.

GET IT SHIPPED

A striking contrast between the tech

industry and the legal sector lies in their approach to product development, says Jacqueline Schafer. In tech, a cardinal rule is to "ship" a feature – that is, release it to customers – even if the initial version is less than perfect and potentially embarrassing. The reason for this is that if you spend too long developing bells and whistles, you are missing out on all the value that could be delivered to people without those bells and whistles.

The legal profession is known for valuing accuracy above all else, which can make it difficult to embrace the 'launch and iterate' mentality that is common in the tech world. **LPM**

Continue reading about extracting real value from tech solution on the LPM website

IMANAGE

Leading-edge document management, data security and AI solutions.

t 07498 202346

w www.imanage.com



The future is flexible



Adam Bullion of PracticeEvolve discusses the four-day working week and other flexible working models emerging on the horizon

Just recently, the government applied new legislation giving workers the right to request flexible working arrangements. As the new laws came into force, 61 companies have been trialling a four-day week over the last six months. Of those companies, 56 have extended the scheme and 18 have now made it permanent. While some of us may listen to the rhetoric around reduced working hours being synonymous with a younger generation, I personally think that's very disingenuous. The concept of a weekend – as we know it today – was only introduced as late as the 1930's, and was embraced by employers who found that the full Saturday and Sunday break reduced absenteeism and improved efficiency.

As leaders of business, we must accept change is constant and over the coming years, we will continue to see fundamental changes to how we work, whether that's the working week or where we work from. But what's driving that change? A younger generation who are more actively mobile, and utilising technology to achieve a better work-life balance.

As businesses today are introducing policies that appeal to staff, or perks such as 'flexible working' schemes, employees are seeing more freedom and flexibility

in their approach to work. However, with all of this change, it is imperative that law firms are now set up with the right technology to encourage this. Ultimately, as staff demand better flexibility, it's crucial they are able to access their work from wherever they are. While 67% of law firms are already on their journey to the cloud, more now need to embrace cloud technology to secure their future. Trepidation around cloud is reducing as the evolution of technology, as well as education around cloud offerings, is increased.

With cloud comes connected and integrated software – these integrations ensure important data can be passed through using APIs. **LPM**

Read more about the flexible future of working models 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



Onboarding at speed

Legl has helped Woodstock grow and expand with remote consultants across the country by digitising their client onboarding and payments processes

Woodstock Legal Services is a niche law firm providing residential and commercial property, employment and private client legal services across England and Wales. Half of their 35 employees are self-employed as consultants.

Natasha Boyland, director and head of operations and risk, provides operational and compliance support to the firm and is involved in key strategic projects to assist the firm's growth and strategic plan. Natasha's key focus areas include building strategy, driving company growth, and

managing the internal tech stack.

THE PAIN POINTS

Woodstock were leveraging a software tool to handle ID verification as part of their client onboarding processes. When Boyland joined the firm, she had discussions with the directors around hiring someone to help with the admin of chasing clients. This would have included tasks such as following up client onboarding, sending requests, and getting documents back. Natasha felt this approach was unnecessary and suggested instead implementing a tech solution to streamline processes. In addition, Woodstock were using a tool for payments on a small scale, but were primarily driving client payments for legal fees by including the firm's bank details on every invoice. The firm also had no way of taking phone payments, which resulted in some awkward conversations with clients.

Boyland had heard of Legl when her previous company implemented the platform, and it had piqued her interest.

Once at Woodstock, she noticed that the verification process through the legacy system was proving clunky, and "Legl was just so forward-thinking and entrepreneurial," something that matched the spirit of her firm. Boyland also knew that the fees on card transactions with Legl were better than with Woodstock's existing system, and there were tools that would improve the collection of client payments, including payment request links and the ability to take phone payments that would be logged directly in the platform. By allowing clients to make payments from overseas or outside of office hours, the firm was able to "untap our limitations by giving people options" as to when and how they paid for services.

THE SOLUTION

Boyland put Legl forward to her internal team and they loved it from the outset.

The time to implement the platform "felt like minutes – it was so slick and easy. At every stage, I knew what was happening and who I was dealing with. Legl is always one step ahead. I've never had this experience from any other vendor." **LPM**

Read more about Woodstock's shortened onboarding times on the LPM website

LEGL

A modular, data-first platform that automates onboarding, compliance and payment processes

t 07817 550 157
w www.legl.com



NATASHA BOYLAND, DIRECTOR AND HEAD OF OPERATIONS AND RISK, WOODSTOCK

"At every stage, I knew what was happening and who I was dealing with. Legl is always one step ahead. I've never had this experience from any other vendor."

Closing the gap



Reflecting on the second episode of LPM Tiger Team 2023, in partnership with NetDocuments, where the focus was automation

While there is widespread acknowledgement for the value that automation could bring to SME law firms – based on LPM Frontiers research from recent years – large segments of the SME legal market remain hesitant to take the automation plunge. Why? We brought together a set of business leaders from sector with a diverse range of expertise to try and understand the key issues.

The first key challenge raised by our Tigers was understanding how much of their firms' operations really have the scope to be automated. Sean Stuttaford, chief operations officer at Thompson Smith and Puxon, described how his firm undertook an exercise at the cusp of its automation journey a decade ago – plotting the various types of work along a spectrum of 'bespoke' to 'standardised,' 'systemised' or 'commoditised.'

A complex undertaking in itself, he reveals that it can also be a controversial exercise, stating that "lawyers tend to think their work lies more towards the bespoke side of the spectrum."

The next step was to identify a target position on the spectrum based on the firm's strategic goals – placing

client needs at the core of this work, while prioritising efficiency and costs savings, particularly under the current circumstances.

Lindey Dewart, practice manager at Thomas Flavell & Sons, noted that property work occupies a significant position at her firm, which made it a good starting point to examine the entire client journey and identify automation opportunities.

For her, the biggest challenge was adoption – "it's hard for lawyers to rely on a third party to handle certain aspects of their work, so there was a lot of resistance to change at first." **LPM**

Read more about closing the automation gap in SME legal 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

Experience matters



Empathy, responsiveness and personalisation are just some hallmarks of a good client experience, says Nick Hayne of Quiss

When it comes to attracting and retaining clients, the difference between success and failure for law firms will typically hinge not on the legal knowledge or technical expertise within the firm, but on the quality of service provided; how did they make the client feel throughout.

In the world of IT managed service providers, the same is largely true. Despite what marketing might say, the technical ability across firms is similar. So, the quality of service delivered and desire to go the extra mile to resolve every problem, should be the deciding factor when choosing an IT partner.

It is this realisation that makes customer satisfaction scores incredibly important for a business such as Quiss. This Customer Satisfaction Score (CSAT) is a customer experience metric that measures happiness with a product, service, or customer support interaction through a customer satisfaction survey that simply asks: "How satisfied were you with Quiss?"

We have worked hard to improve the experience delivered to every user and every client, and this effort is paying dividends. Our CSAT score for quarter one of 2023 for our service desk saw 97% of

respondents rate their interaction as being good or excellent.

The improvements we have delivered required us to focus on key considerations, including:

- **Empathy.** Customers want to be heard and understood – it's important to approach each interaction with empathy and genuine concern for the customer's needs.
- **Responsiveness.** Customers largely expect a prompt response to their enquiries, complaints or issues. **LPM**

Read more about the pillars of a positive client experience 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

Road to innovation

The story of how Moray Group leveraged LexisNexis Visualfiles to accelerate digital innovation in the traditional legal services delivery model

Established in June 2020, Moray Group is a new professional services group for Scotland, and an innovative umbrella brand bringing together industry experts across legal, property and financial services. The group provides a diverse range of services to individuals, families, SMEs and larger corporates.

Moray Group is adopting LexisNexis Visualfiles to inject tech into its business operations to break the traditional mould and reinvent the professional services delivery model. Immediately, the technology programme is underway

“From extensive personal experience of using Visualfiles over many years, it’s genuinely one of those ‘if you can dream it, it can do it’ type of products.”

ROB ABERDEIN, GROUP CEO, MORAY GROUP

in Moray Legal Limited. Once complete, Moray Legal will challenge time-honoured market practices by providing a modern, digitally-enabled service that delivers outstanding customer experience and a high quality of legal advice and consultancy to clients.

REVOLUTIONARY VISION FOR MORAY LEGAL

The group’s vision is to transform Moray Legal into a national legal services provider in Scotland, offering everything from property, estate agency and remortgages through to family law, corporate law and private client focused offerings – all delivered through a single Visualfiles technology platform.

Explaining the Group’s rationale for selecting Visualfiles, Rob Aberdeen, Group CEO of Moray Group, says: “Our vision is to transform the traditional model of legal services in Scotland by using technology to revolutionise the way law is delivered north of the border. Visualfiles is the only platform on the market today that can



be tailored without limit. We won’t be restricted by supplier-defined business processes. From extensive personal experience of using Visualfiles over many years, it’s genuinely one of those ‘if you can dream it, it can do it’ type of products.”

PROCESS EFFICIENCIES FOR OUTSTANDING CUSTOMER EXPERIENCE

Moray Legal is using Visualfiles as the division’s core platform for legal workflow and document generation. The platform sits across the debt recovery, litigation, and property practice areas.

When fully customised, with the platform expanded across the division, Moray Legal will benefit from significant process efficiencies. The division will use the platform to drive end-to-end processes for speedy completion,

minimising human involvement where appropriate, but embedding in-person touchpoints for risk management and allowing the highly skilled staff time to focus on tasks that utilise their capabilities. **LPM**

Read more about Moray Legal’s digital transformation journey on the LPM website

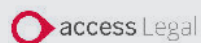
LEXISNEXIS ENTERPRISE SOLUTIONS

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



Advanced offers market leading software, trusted by over 5,000 law firms and barristers' chambers.

www.oneadvanced.com



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



Miller is a leading specialist insurance broker, securing professional indemnity and other insurances for all law firms.

www.miller-insurance.com



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

BECOME AN LPM CHANNEL PARTNER



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

CHECK OUT
OUR CHANNEL
PARTNERS

p7

GO TO
LPMMAG.CO.UK

