

MAY 2023

# LPM

LEGAL PRACTICE MANAGEMENT

# Best-case scenarios

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Are we inching closer to the future we've always imagined?

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## **CHATGPT AND THE FUTURE**

Is the new AI tool that everyone's talking about friend or foe for law firms?

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## **FEED BACK ON CULTURE**

How working groups can help create a positive feedback culture

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## **BRINGING SYSTEMS TOGETHER**

A selection of cloud-based systems would create a seamlessly integrated tech stack

# Welcome

Is the world of business starting to resemble the 'future' that we've been working towards for decades?

Sci-fi has long painted a picture of automation and artificial intelligence governing the world - machines working in perfect sync to perform and support human functions. Here in the real world, we've been envisioning a utopian future where business is efficient, productive, inclusive, sustainable and less of a burden on people involved.

This issue of LPM puts these best-case scenarios under the microscope - is the seemingly omnipotent ChatGPT as valuable as it's touted to be? (p3) How far are firms from a seamlessly synced-up set of systems? (p6) Will digital advancement rejuvenate the talent market? (p4) How can firms build a more positive working culture? (p3) And is there a way for firms to measure their diversity and inclusiveness effectively? (p6)

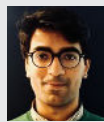
Explore all these questions, plus read some helpful tips on managing your firm's tech stack (p4), and read how George Green outsourced that very task to **Oosha**, an **Access Legal** company, and reaped a host of productivity and efficiency benefits (p5).

A final note from me, this will be my last issue of LPM - I will be moving on at the end of this month. It's been a pleasure, and do stay in touch.

Aftab Bose, editor

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#### Feed back on culture

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# Feed back on culture



Kelly Pike, head of HR at SA Law, outlines how establishing working groups helps to build a positive feedback culture in a law firm

Creating a strong feedback culture can play an integral role in building a productive, positive and attractive working culture within a business. So, when all employees are encouraged to contribute to discussions about the firm, it can enhance engagement and make them feel valued. Senior managers and HRs will also become attuned to the needs of their workforce, and ensure firmwide policies and benefits reflect these.

Running working groups on issues important to the firm is an effective way of building this strong feedback culture. At SA Law, we have a number of groups that meet on a monthly/bi-monthly basis to discuss ideas and provide feedback. There is an individual group for each of the following areas: environment, international work, legal technology, best friends network, firm innovation and growth, wellbeing, as well as equality and diversity.

If you're considering setting up groups yourself, it's worth bearing our experiences, explained below, in mind. Since establishing working groups 18 months ago we've been able to make some positive differences to the firm's strategy, and employee experience.

Attendance is voluntary, and as the groups have become more established and the benefits realised, we've seen most employees join at least one or two.

There are rules and agendas set around each meeting to ensure everyone has a voice. This is with the aim of encouraging the younger generations in our workforce to play an active role. We value their perspectives, and how much they can meaningfully contribute to the success of the business. We wanted to create an environment where, instead of it being difficult to get your voice heard, we actively welcomed it.

We've done this by 'banning' partners and senior leaders from holding a chair position (which is a different individual each time) to ensure views from paralegals, trainees and business management staff are heard. Each session's points are noted down by the human resources (HR) team or an appointed secretary, who is then responsible for seeing through any decisions made. [LPM](#)

**Continue reading about a positive feedback culture on the LPM website**

# ChatGPT and the future



Is ChatGPT a friend or a foe when it comes to knowledge work in law firms? Alex Smith, global product management lead at iManage, comments

One way or another, ChatGPT will have an impact on knowledge work. Its generated content may have even been consumed by us without our knowledge. Large language models have made huge advancements in the ways that they can string together words in complex sentences to give the impression of intelligence, like a typeahead on steroids. But large language models like ChatGPT do often get things wrong, and when they do, they go 'all in', on these alternate facts and realities. In an entertaining piece of marketing, their development teams have labeled these bugs as "hallucinations."

## A TOKEN EFFORT IN STOPPING BURNOUT

Ask ChatGPT to draft a fully bulletproof contract for a Sydney real estate purchase and it's like watching a lawyer on fast forward after four double espressos. When ChatGPT is generating its output, it doesn't intentionally mimic human typing (unless it's programmed to slip in the odd mistake to make text appear more human). It's actually processing chunks at a time using a token system. Words are broken down into multiple "tokens" to predict what text it should output next.

If we see hesitation from a colleague on

Slack or Microsoft Teams, we may think that they are unsure of their response, or thinking it through. It's impossible to identify hesitance or lack of confidence in generated answers from ChatGPT, because its language model is incapable of doubting its abilities.

In contrast, in a recent survey of 9,615 global knowledge workers, it was reported that seven in ten have experienced imposter syndrome, and that 42% had experienced both imposter syndrome and burnout.

In an industry founded on interpretation of very solid pieces of truth like laws, case law, and citable material, there's a real danger that ChatGPT could create vastly more work than it can help complete. [LPM](#)

**Read more about the automation potential in SME law firms on the LPM website**

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# Where is everybody?



With a shortage of talent in the market, Adam Bullion of PracticeEvolve discusses how legal technology providers are assisting law firms

Over the Easter weekend, we were able to enjoy the warmer weather with a barbecue and some friends over. Having come out of hibernation, our conversation turned to business and the challenges we all face. The common theme for all of us was finding talent within our respective businesses. My friends, all from different industries, stated how shallow the pool is.

Competition for talent is fierce and it's clearly not uncommon for candidates to have several offers on the table at any given time.

The talent shortage is quite a unique situation to be in and as our research last year demonstrated, law firms are not immune from this phenomenon. Indeed, within our research last year, law firms identified both acquiring and retaining talent as a key challenge.

According to new articles this week, some businesses have turned towards offering Friday afternoon's off, as a perk, in an attempt to attract the talent they need. It could be viewed as the beginning of the four-day week as it provides significant flexibility.

With the talent pool being so shallow right now, there is significant impact on law firms and the technology they

have adopted. For many firms, legal technology needs to be constantly managed, with customisations and content management, but for many the staff who used to manage this area are now in short supply. This means firms are starting to consider their own technology strategy and review what is available within the marketplace.

They are now looking towards providers who can help them achieve efficiencies with tech that features managed workflows, content and more. Ultimately, it eases the burden on finding talent in a shallow pool. Additionally, firms can no longer simply consider the software in isolation. **LPM**

**Continue reading about how tech can help firms deal with a talent shortage on the LPM website**

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# Managing your IT lifecycle



Firms face a host of cyber and regulatory risks without an IT lifecycle management plan, says Nick Hayne, head of professional services at Quiss.

Technology is becoming increasingly important for law firms as they overcome the challenges of increasing competition across the sector and clients of every size demand more for less and expect everything delivered more quickly.

Collaboration with colleagues working from home and better communication with clients are just two scenarios that rely heavily on technology, to say nothing of the need to store and protect sensitive data.

However, as technology continues to evolve, so do the risks associated with it, and not having an IT lifecycle management plan (ITLMP) can threaten the security and efficiency of any law firm, whatever its size. An ITLPM is essential for law firms, delivering a number of advantages:

## 1. INCREASED RISK OF CYBERSECURITY THREATS

Without a robust ITLMP, law firms leave themselves vulnerable to cybersecurity threats as hackers find new ways to exploit vulnerabilities in older systems as technology advances. A plan can help ensure all security patches and updates are applied quickly, to help reduce the risk of cyber-attacks. It will also help law firms identify potential risks and proactively

address them before they become a major issue.

## 2. LOSS OF PRODUCTIVITY

Technology is designed to make lives easier, but without proper management, it can have the opposite effect. When hardware and software are not maintained or updated regularly, they can become slow, unresponsive, or even crash, which can lead to downtime and loss of productivity. A credible ITLMP ensures technology is always current and reduces the risk of system failures and downtime.

## 3. INCREASED COSTS

Without a plan, law firms may miss critical software or hardware updates. **LPM**

**Read more about managing your firm's IT lifecycle on the LPM website**

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# Support at source

Read how George Green benefitted from working with Oosha, an Access company, to improve the performance and efficiency of its IT systems

## THE BACKGROUND

George Green is a full-service law firm based in the West Midlands, supplying a range of legal services for both businesses and individuals, including corporate, employment, dispute resolution, family, private client and residential conveyancing. It employs 90 people across two offices, one in Cradley Heath and one in Wolverhampton.

## THE CHALLENGE

George Green's previous IT system was proving to be increasingly outdated and was affecting the efficiency of day-to-day operations. Historically, George Green had its servers on-site but was conscious of the additional risks involved in terms of business continuity and data security.

At the same time, they were nervous about moving to the Cloud. In addition, George Green had no internal IT function meaning they were unable to either project manage IT change or provide fixes for day-to-day issues.

## THE SOLUTION

George Green turned to Oosha for IT help in September 2016, initially for Oosha's IT Service Desk, benefitting from their extensive experience in supporting UK law firms. This built the foundations which have recently resulted in George Green selecting Oosha as their cloud partner. Employees at George Green were highly office-based before the COVID-19 pandemic and had to make adjustments to work seamlessly from home. In January 2022, Oosha helped them deploy the Virtual Desktop solution, which has significantly improved IT performance across the business.

The deployment has included a Microsoft 365 roll-out and an upgrade to Matter Sphere V9, its practice management software. George Green has also been able to use Microsoft Teams to hold secure virtual meetings, both internally and with clients. All these developments have enabled the company to continue providing a high-quality service for



customers and have enabled them to encourage more flexible working in the long-term.

## THE BENEFITS

The partnership with Oosha has been successful for George Green from technological and operational perspectives:

- **Reduced server footprint.** By moving more data into the cloud and away from on-premise data centres, the company saved in cost, space and carbon footprint terms
- **Streamlined processes.** Automation has made the IT infrastructure easier to manage and supports better integration
- **Upgraded software.** With better access to data and applications, staff can easily work from the office, at

home or through a combination of the two

- **Strong support relationship.** George Green has developed close links with Oosha's project and relationship managers. [LPM](#)

**Read more about George Green's journey to efficiency and better performance on the LPM website**

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# Measure inclusiveness



Access Legal's regulatory director, Brian Rogers, offers advice for how to record data on your firm's diversity profile

As part of the Solicitors' Regulation Authority's (SRA's) approach to promoting equality, diversity and inclusion in all firms, regardless of size, are required to report and publish diversity data regarding the make-up of their workforce every two years. The SRA provide a template question set that all employees should have the opportunity to answer. In this article, we'll provide all the details you need to know and how you can quickly and easily complete the survey with no need for printed surveys, collection boxes, or invasive technology.

## WHO IS RESPONSIBLE FOR COLLECTING DIVERSITY SURVEY DATA?

Technically, your firm's COLP is responsible for all everything compliance, which includes complying with the SRA diversity requirements, though it is possible to delegate or outsource the job of collecting the data.

## WHEN DO I NEED TO COMPLETE THE SRA DIVERSITY SURVEY?

The SRA have already released the question set for the 2023 diversity survey but as yet have not announced

when they will be opening their portal for submissions. However, we expect the window to submit your survey responses to be open some time between July and August 2023. As such, you are welcome to begin collecting our diversity data as soon as practicable. We'll be releasing our own diversity data collection survey, which allows you to protect your employees' anonymity on 2 May 2023.

## WHAT DATA DO I NEED TO COLLECT?

The survey contains 14 questions relating to your employees' protected characteristics. [LPM](#)

[Read more about recording your firm's diversity data on the LPM website](#)

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# Bringing systems together



An selection of cloud-based solutions, seamlessly integrated, is the key to efficiency for law firms, says Kaden Smith, director at NetDocuments

Building your law firm's tech stack is a process filled with questions: Which systems are essential as opposed to nice to have? Which ones will deliver the greatest return on investment (ROI)? Where can technology result in strategic advantages for your firm?

At the same time, the ways in which people want and need to work have changed, and clients (and potential clients) are expecting better, more modern experiences from their legal service providers. The key to success – the right combination of cloud-based legal technology tools, seamlessly connected. This enables your people to do their best work and results in better experiences – both internally and for clients.

## ELEVATED CASE MANAGEMENT

The pandemic forced many firms to quickly adapt to some form of remote work, which brought on a surge in adoption of cloud-based technologies. Firms realising accelerated success today are going beyond the cloud-based version of their case or practice management solution (CMS) and adding a powerful document management system (DMS) to elevate the way they work.

Documents are at the heart of how

law firms operate, so providing lawyers with tools to access and share important files easily and securely is critical to efficient and more profitable business operations. Like many organisations using an existing CMS to store and manage documents, searching for and collaborating on files can be difficult – especially for professionals who spend their day working in Word or Outlook, as it takes time to switch between different applications. With a DMS connected to or embedded in your CMS, users can work in Outlook, Teams, Gmail – or any other cloud-based applications – and keep documents and emails securely. [LPM](#)

[Read more about the tight selection of cloud-based systems on the LPM website](#)

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